



[Client Preferred Name]

As we move through March and begin to welcome the first hints of spring, we wanted to share a few timely resources to help you stay organized and informed this season. In this month's edition, you'll find an estate planning checklist to revisit throughout the year, along with insights on how tax planning has changed following the One Big Beautiful Bill and six strategies that may help reduce your tax bill.

With tax season well underway, we've also included simple instructions for accessing your tax documents through Morgan Stanley Online, making it easier to find what you need when you need it.

And with St. Patrick's Day just around the corner, we've added a delicious braised corned beef recipe—perfect for celebrating the occasion.

As always, if there's anything we can help with, please don't hesitate to reach out

Warm regards,

The Praesidio Group at Morgan Stanley

Forbes Best-In-State Wealth Management Teams (2026)
Source: Forbes (Awarded Jan 2025) Data compiled by SHOOK Research LLC based for the period 3/31/24-3/31/25.

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Monthly Insights



Estate Planning Checklist: 13 Smart Moves

Follow this estate planning checklist for you (and your heirs) to hold on to more of your hard-earned money.

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Tax Season 2026: Planning After OBBBA

How could the One Big Beautiful Bill Act shape your taxes and household finances? Top thought leaders share insights.

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Uncover 6 Ways to Reduce Your Tax Bill

Examining your tax return may reveal opportunities to save money hidden between its lines. You may be surprised by what you find.

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[Access Tax Documents](#)

Seasonal Corner

Braised Corn Beef

With Honey Mustard Glaze

[View Recipe Here](#)

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