



JUNE UPDATES

[Client Preferred Name]

As we move through June, investors and families alike are facing an increasingly dynamic economic environment—from evolving global trade policies to fluctuating markets and long-term planning priorities. In this edition, we’ve gathered timely insights and actionable resources to help you stay informed and prepared.

As always, I'm here to help you navigate these conversations. Let's find a time to connect soon.



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Midyear Economic and Investment Outlook

We invite you to watch the replay from our thought-provoking Midyear Economic and Investment Outlook with Lisa Shalett, Ellen Zentner, Andrew Slimmon and Andrew Sheets, recorded on Monday, June 2<sup>nd</sup>.

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Preparing Your Estate Plan

Your plan should be customized to provide instructions regarding how your financial assets will be preserved, managed and distributed during your life, during incapacity, and at your death.

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The Tax Bill and Your Portfolio: Four Takeaways

What could the 2025 House budget bill mean for your tax situation and investment portfolio? Here are four things to know.

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VoicelD Enrollment

Morgan Stanley offers VoicelD authentication technology to provide enhanced security for your accounts through effortless authentication on the phone. Please refer to this guide for more information.

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