

New-Video Update Inside First Quarter Newsletter

I hope you're doing well.

As we move through the first quarter of 2026, it can be a helpful time to step back and make sure your financial strategy remains aligned with your personal and family goals.

Do not miss the short video, where you will find a quick overview of what's moving markets and the key themes shaping the current investment landscape.

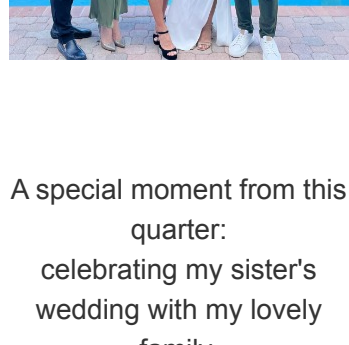
I also wanted to share a brief first-quarter update with you, including a few personal notes, alongside market highlights and timely insights that may be worth keeping on your radar.

My goal is always to help you stay informed, focused, and confident about the bigger picture, without getting lost in day-to-day market noise.

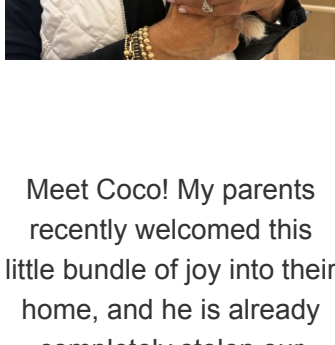
If anything you read here sparks a question, or if there have been changes in your life, career, or priorities, I'd welcome the opportunity to connect. Even a quick check-in can help ensure your strategy continues to support what matters most to you.

[Link To Video](#)

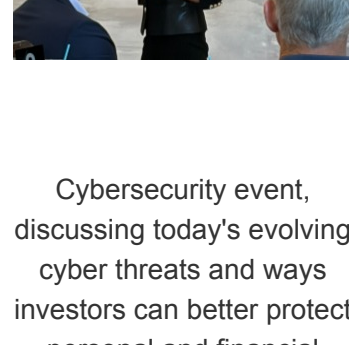
Events



A special moment from this quarter: celebrating my sister's wedding with my lovely family.



Meet Coco! My parents recently welcomed this little bundle of joy into their home, and he is already completely stolen our hearts.



Cybersecurity event, discussing today's evolving cyber threats and ways investors can better protect personal and financial information.

Watch The Market Update Video



My video with timely market insights, including what is driving recent market activity, what the economy and central banks are focused on, and the key risks investors should keep in mind.

[Watch Here](#)

Updates



How to Plan Instead of Panic in Volatile Markets

Market volatility can increase or decrease depending on where we are in the business cycle. Learn how to recognize common investing mistakes and stay focused on your long-term financial goals.

[Read More](#)



Tax-Smart Investing. All Year Long

Taxes act as a drag on your investment performance that can be heavier than any fee you pay. But they might also be the easiest to reduce, with the right strategies in place. Morgan Stanley Total Tax tool offers a full spectrum of tax-efficient solutions to help mitigate the tax drag on your portfolio—so you can keep more of what you earn and improve after-tax returns.

[Read More](#)



Iran Conflict: Seven Takeaways for Investors

Prolonged conflict with Iran could lead to higher oil prices, hotter inflation and greater market uncertainty.

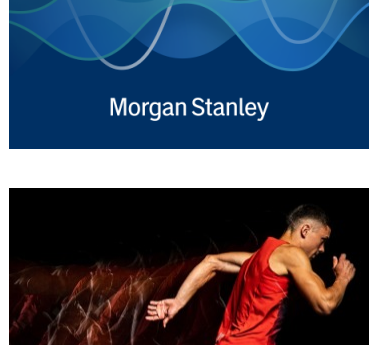
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AI Disruption Concerns Do Not Compute

Investors have been punishing software and data stocks on worries about AI disruption, but those fears don't match the fundamentals.

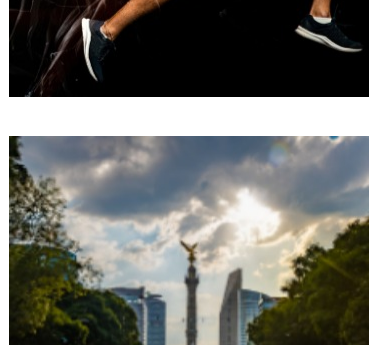
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The Reasons for the Bull Market to Resume

Our CIO and Chief U.S. Equity Strategist Mike Wilson explains why history, technicals and fundamentals suggest a clearer runway for U.S. stocks six months out, despite geopolitical concerns.

[Listen Here](#)



Who Is Leading the Global AI Race?

The U.S. and China are in a race for AI dominance. Here's how each country stacks up, along with opportunities for investors across the AI ecosystem.

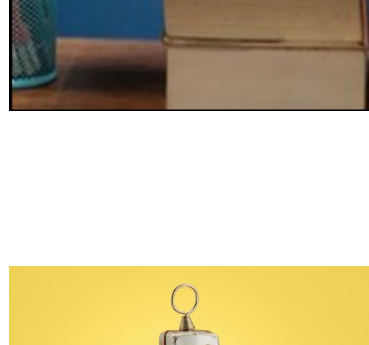
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Top 10 Policy Actions To Watch in 2026

Health care costs are rising, especially for retirees, and some may need long-term care. Learn the moves you can make to help prepare yourself.

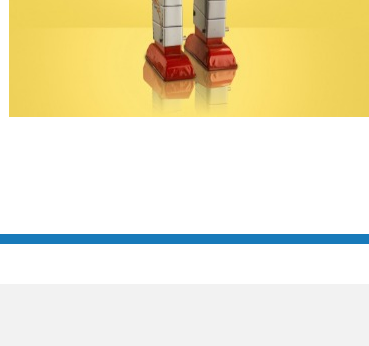
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Innovation in Alternatives Vehicles

Brian Holzer, Head of Alternative Investments Sales & Distribution, sits down with Alisa Wood, Partner at KKR, to discuss what's driving the rapid rise in private markets, how evergreen and registered structures are reshaping access, and key considerations for portfolio construction – including why alternatives are often approached with a longer investment horizon.

[Read More](#)

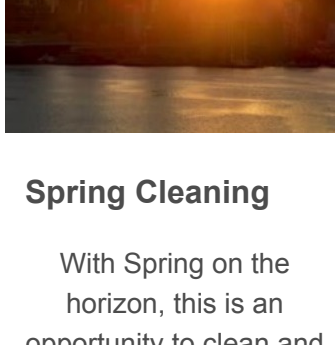
Season



Life's Essential

8 comprises two major areas: Health Behaviors and Health Factors.

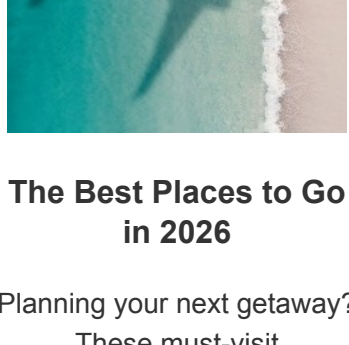
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Spring Cleaning

With Spring on the horizon, this is an opportunity to clean and declutter both your real house and your financial house.

[Read More](#)



The Best Places to Go in 2026

Planning your next getaway? These must-visit destinations for 2026 highlight the best places to travel, from emerging hotspots to timeless favorites.

[Read More](#)

Thank you for reading my first quarter Newsletter!

We hope you found these insights valuable. As always, please don't hesitate to reach out to us with any questions or if we can be of assistance.

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Because of their narrow focus, sector investments tend to be more volatile than investments that diversify across many sectors and companies.

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