

2023 Holiday Newsletter

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As we head into the end of 2023, we have compiled valuable information and tips on current trends, opportunities, and happenings that might be of interest to you this December.

We wish you and your family happiness, health, and some well-deserved rest this holiday season.



Your 2023 Guide to Holiday Giving

As the holidays approach, many of us are eager to make the season bright by giving to loved ones and those in need. Here are some financially smart strategies to help you support the people and causes you value most.

Holiday Giving Guide

Give the Gift of Education this Holiday Season

Looking for a more meaningful gift this holiday season? Consider giving your children, grandchildren, nieces and nephews the gift of learning—through a 529 plan.

Read More



Five Holiday Scams to Avoid

Cybercriminals look forward to the holidays, too—but for starkly different reasons. This time of year represents an opportunity to unleash their schemes on a busy, distracted audience that's focused on merriment, not mayhem. Become familiar with these common scams.

Avoid these 5 Scams

Updates From Washington

With 2024 fast approaching, if you haven't already given some thought to your year-end tax strategy, now would be a good time to do so.

118th Congress Tax

Updates

Your Year-End Tax Reminders

Make the Most of Your Winter



Best Places to Visit in Winter

Looking to plan a vacation? Winter travel doesn't always have to be cold. Here is U.S. News' list of the top winter travel destinations.

Top Winter Destinations



Quick & Easy Holiday Recipes

It's always a good idea to keep a few simple recipes that come together quickly, giving you more time for what's really important.

Top 50 Holiday Recipes

[Signature of Primary Contact]

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