

## The Brewer Group at Morgan Stanley March Newsletter

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Welcome to this month's newsletter from our team. Inside, you'll find timely market and investing insights in our "On the Markets" feature, along with practical investor resources and articles on key planning topics—like navigating market volatility, life and financial planning after selling a business, managing concentrated stock positions, and perspectives on women and wealth. We always welcome your feedback on what you'd like to see more (or less) of in future issues.

### INVESTOR RESOURCES



#### 5 Strategies to Navigate Market Volatility

Market volatility, while unsettling, is a normal part of investing. Here are five strategies to help you navigate through it.

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#### Financial Planning for Life After Selling a Business

Selling your business can mean big changes for your life, both personally and financially. Know how to make the most of your windfall.

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#### Is Your Portfolio Too Concentrated?

Understand the risks of concentrated stock positions and explore tax-smart strategies to help diversify your holdings.

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#### Women and Wealth: What to Consider in Your Financial Planning

Women make up half the population but for so long have been treated like a niche demographic in financial services. Today, women are largely responsible for their families' financial decision-making, and hold the majority of consumer spending power.

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### ON THE MARKETS

#### On the Markets Exploiting Rotation's Excesses

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### CELEBRATING WOMEN'S HISTORY MONTH

This Women's History Month, we recognize the achievements, leadership, and lasting impact of women—past and present—who have helped shape our communities, our industry, and the world.

At Morgan Stanley, it's also a moment to reflect on how we can keep building workplaces where women can thrive: expanding opportunity, strengthening sponsorship and mentorship, and ensuring every voice is heard.

Thank you to the women who lead, innovate, and support others every day.

### FROM THE BREWER GROUP

As our client, we'd like to thank you for your ongoing support. To stay up to date with our team and explore our full suite of services and resources, check out our website at the link below.

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