

Winter Newsletter



From left to right: Lee K Meeks, Financial Advisor, Russell Cowman, Financial Advisor, Patty Brueckner, Senior Registered Client Services Associate



5 Personal Money Moves for the New Year

Heading into 2026, it's time to take stock of your budget, debt and investments—and check them against your financial goals. These five steps can get you started.

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7 Steps That May Reduce Taxes on Your Income and Portfolio

A key strategy for boosting long-term investment returns is being smart about tax efficiency.

[Learn More](#)

Wishing Everyone a Delightful 2026



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The Capital of Texas Group at Morgan Stanley

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