



Pictured left to right: Christy Welch Wealth Management Associate *Financial Planning Specialist, James Baker Financial Advisor, Raegan Wagner Financial Advisor, Matthew Jens Financial Advisor, John Victor, CFP® Financial Advisor, Stacey Burger Client Service Associate, Tom Hunt, CFP® Financial Advisor, Zach Bouslog, QPFC Financial Advisor, Priscilla Sayed CFA® Financial Advisor, Lisette Villalba Torres Client Service Associate.

This month, we're focusing on **financial literacy** for all generations. We invite you to join our Wealth Education for the Next Generation **webinar**, where we'll cover the importance of **financial planning**.

Hosted by Caroline Gundek, Head of UHNW Client and Field Engagement and Charline Burgess, Senior Wealth Education Specialist

We're also diving into key market trends, including what's driving volatility and how tariffs are reshaping global markets.

As always,
If you have any questions don't hesitate to reach out!

April Insights

THE DES MOINES GROUP AT
Morgan Stanley
INVITES YOU TO OUR ANNUAL
SPRING KICKOFF

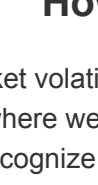
Please join us as to learn more about maximizing your after-tax performance while enjoying beer, wine and hors d'oeuvres.

Thursday | 1st May 2025
4:30pm - 7:00pm
1080 Jordan Creek Parkway
3rd Floor Patio
WDM, IA 50266

Maximizing after-tax performance discussion led by: Chris Nebons
Executive Director, Regional Sales Director at Eaton Vance

PLEASE RSVP TO ZACH.BOUSLOG@MORGANSTANLEY.COM

Approved Submission ID#4320026



2Q25 DMG Quarterly Update Call - Markets in 5 Minutes

Date: **June 27th, 2025**
Time: **9:00am CST**

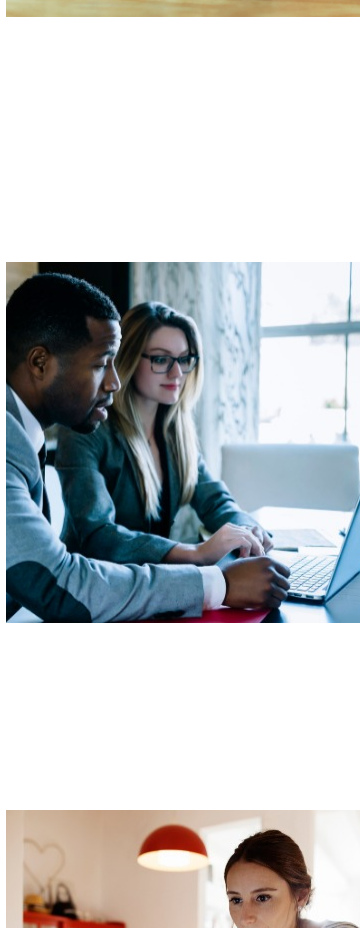
Toll Free: **+1(877) 777 - 8895**
Participant Code: **2066423**

Approved submission ID#4321714

Quarterly Market Essentials

[Click here to learn more](#)

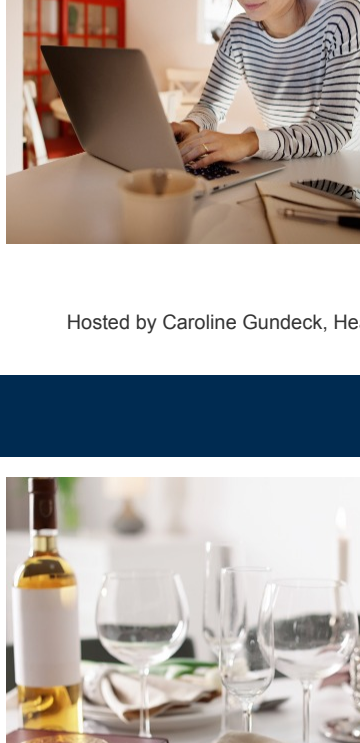
April Insights



How to Handle Volatility

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.

[Learn More](#)



6 Opportunities in Alternative Strategies

In today's dynamic economic environment, strategies that worked before may not be effective. Alternative investments could play a valuable role in your portfolio.

[Learn More](#)



Four Ways Tariffs Are Reshaping Markets

Discover what the Trump administration's tariffs could mean for key equity sectors and how investors can navigate the risks and opportunities.

[Learn More](#)

April – Financial Literacy Month

Money Playbook

Expanding your financial literacy is an ongoing journey, we want to empower you with the knowledge to help make smart financial decisions throughout every stage of your life.

Attached is a Playbook that inspires honest conversations about money and the role money plays in your life. This playbook breaks up important financial topics into chapters, any of which you can review.

[Your Guide To Life and Money](#)

Financial Planning

Managing your finances is about more than managing your investments. We can support you in many aspects of your financial life – including budgeting, cash management, retirement planning and other financial goals.

Action Item: Reply "Let's Schedule" to schedule a meeting and start your financial planning session today.

[Learn More](#)

May 5 - Wealth Education for the Next Generation Webinar

Topic: Money & Saving: Financial Planning and Why It Matters to Me

Webinar Date and Time
Monday, May 5th, 2025
1:00 p.m. – 2:00 p.m. PT / 4:00 p.m. - 5:00 p.m. ET

[Register Here](#)

Hosted by Caroline Gundek, Head of UHNW Client and Field Engagement and Charline Burgess, Senior Wealth Education Specialist

April Calendar



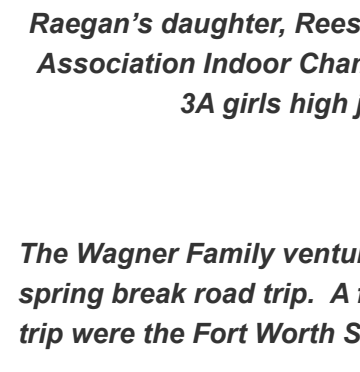
April 12–20 - Passover

Wishing a joyful and meaningful Passover to all who celebrated! May this season of reflection and renewal bring peace and happiness.



April 20 - Easter Sunday

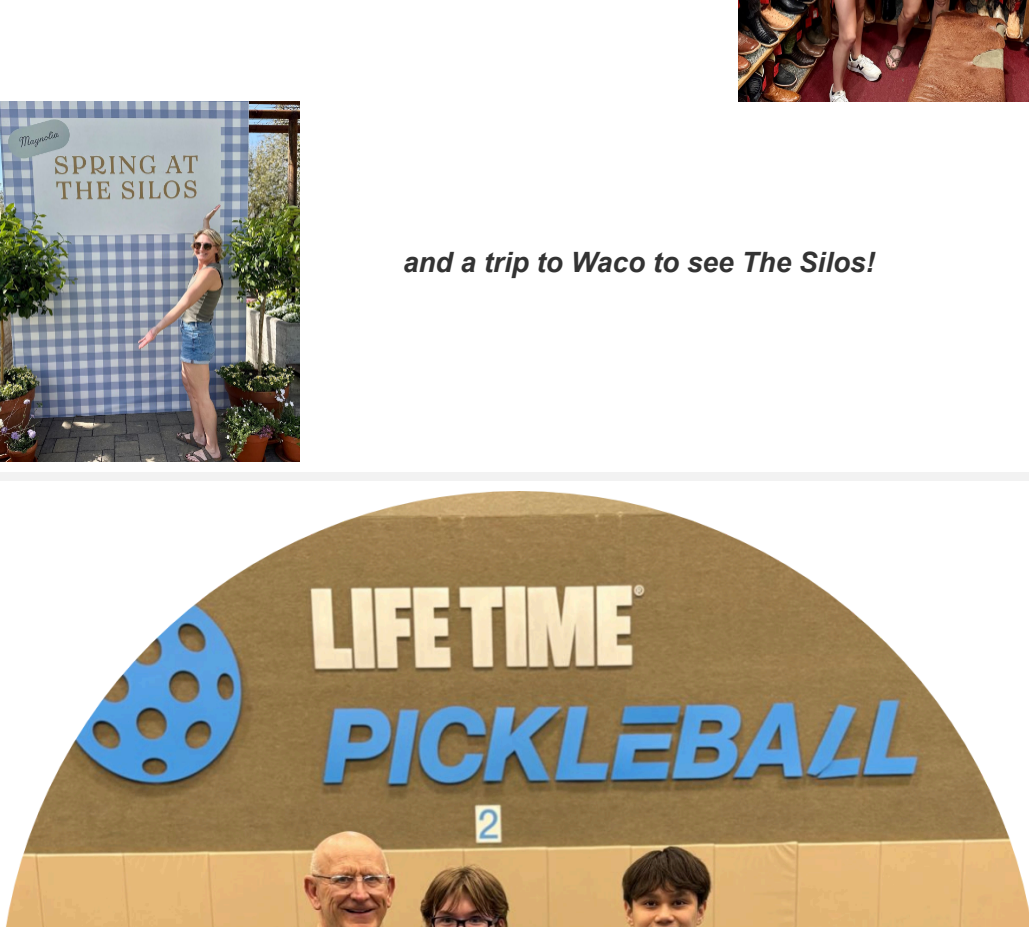
Wishing everyone a joyful Easter filled with hope, renewal, and time with loved ones!



April 22 - Earth Day

Investing in our planet is investing in our future. This Earth Day, let's commit to small actions that create a lasting impact—because every choice counts.

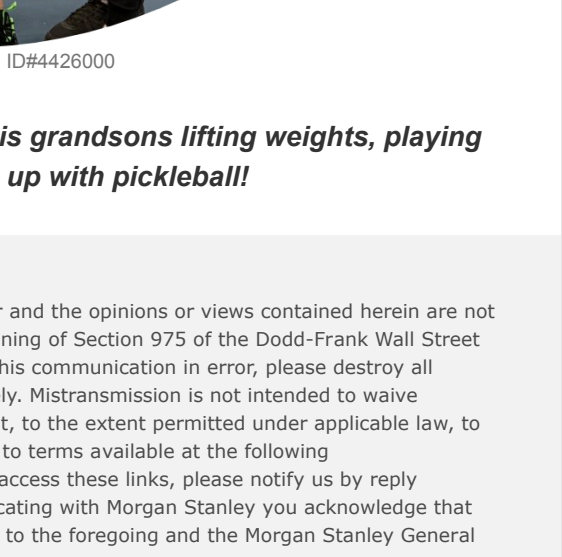
March Happenings: What Have We Been Up To?



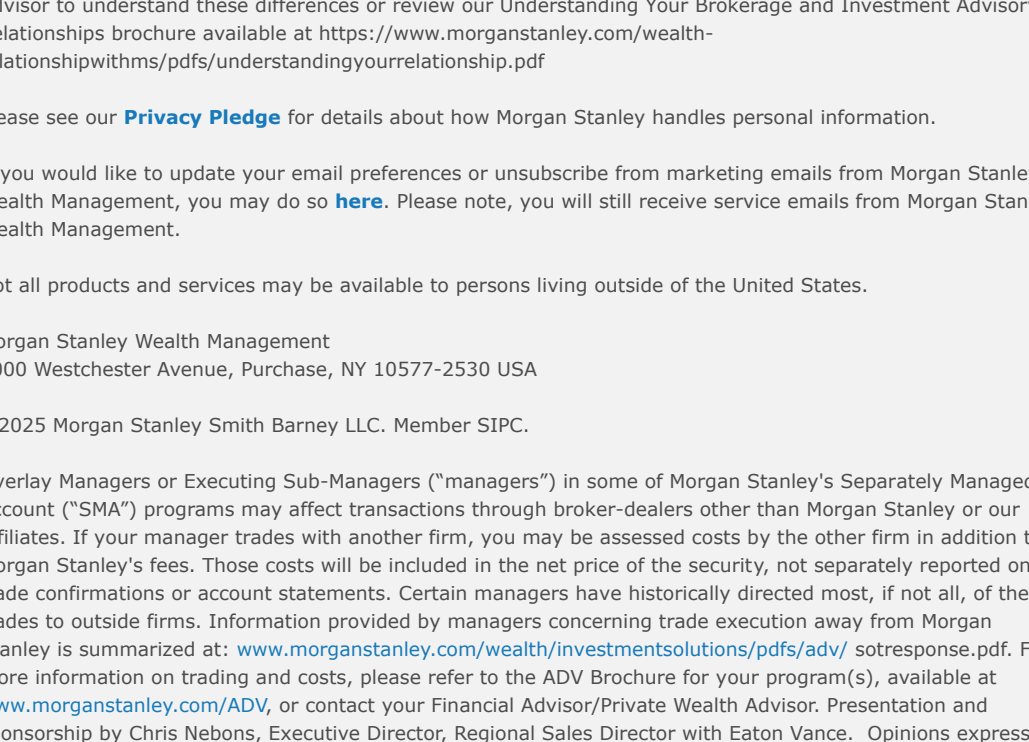
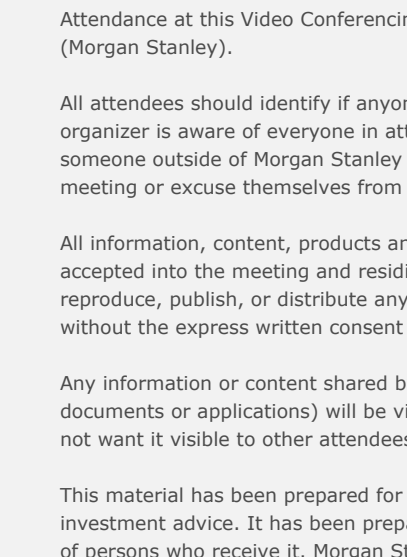
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Tom and Karen spent a couple days in St. Louis with their son Jared over spring break.

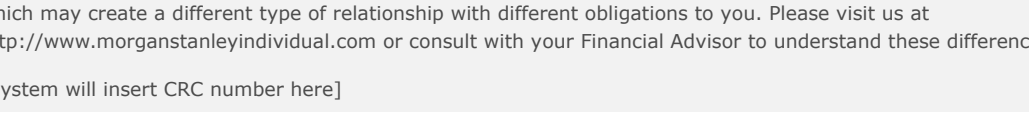
The whole Bouslog family joined in the St. Patrick's Day fun by walking in the parade and handing out candy to the parade-goers.



Their daughter Berkley gained a taste of civic leadership when she attended her first Urbandale Chamber of Commerce Ribbon Cutting with Dad. She was even able to hold the infamous scissors!



In early March, Zach's Rotary Club hosted their 4th Annual Bingo Bash where all funds raised were donated to local non-profits. The family came out to support and even played a few games!



Raegan's daughter, Reese, competed in the high jump at the Iowa Track Coaches Association Indoor Championships in mid-March and set a new record for class 3A girls high jump at 5'3". Coach "Dad" was pretty proud!

The Wagner Family ventured to Texas for a spring break road trip. A few highlights of the trip were the Fort Worth Stockyards...

the Dallas World Aquarium...

a Dallas Mavericks game...

and a trip to Waco to see The Silos!

Approved Submission ID#4426000

John spent a day over spring break with his grandsons lifting weights, playing basketball, and finishing up with pickleball!

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