



Pictured left to right: Christy Wetrich Wealth Management Associate *Financial Planning Specialist, James Baker Financial Advisor, Raegan Wagner Financial Advisor, Matthew Jens Financial Advisor, Stacey Burger Client Relationship Analyst, Tom Hunt, CFP® Financial Advisor, Zach Bouslog, QPFC Financial Advisor, Priscilla Sayeed CDFA® Financial Advisor, Lisette Villalba Torres Client Relationship Analyst.

[Client Preferred Name]

February brings a chance to keep moving forward with purpose inherited from the new year. In this month's newsletter, we're sharing the latest insights, important updates, and a look at what's ahead so you can stay connected to priorities and opportunities across the business.

Team Promotions!

We are proud to share our team members' promotions this month:

Tom Hunt - **Senior Vice President**
Jim Baker - **Senior Vice President**
Zach Bouslog - **Vice President**
Christy Wetrich - **Assistant Vice President**

February Insights

Quarterly Market Essentials

[Click here to learn more](#)



7 Steps That May Reduce Taxes on Your Income and Portfolio

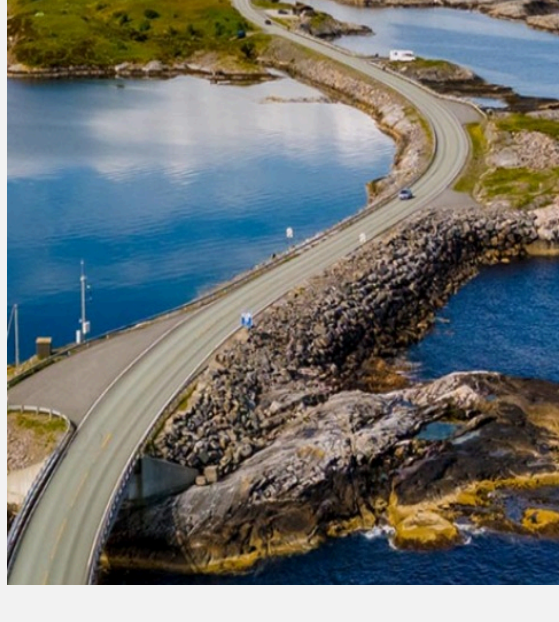
A key strategy for boosting long-term investment returns is being smart about tax efficiency.

[Learn More](#)

Four Key Investment Themes for 2026

Morgan Stanley Research's key investment themes for this year are Tech Diffusion, The Future of Energy, The Multipolar World and Societal Shifts.

[Read the Article Here](#)



Thoughts on the Market

Morgan Stanley

The Boost From Easing Market Rules

Our Global Head of Fixed Income Research Andrew Sheets looks at the implications of the U.S. government's efforts to ease regulations, from bank balance sheets to asset valuations.

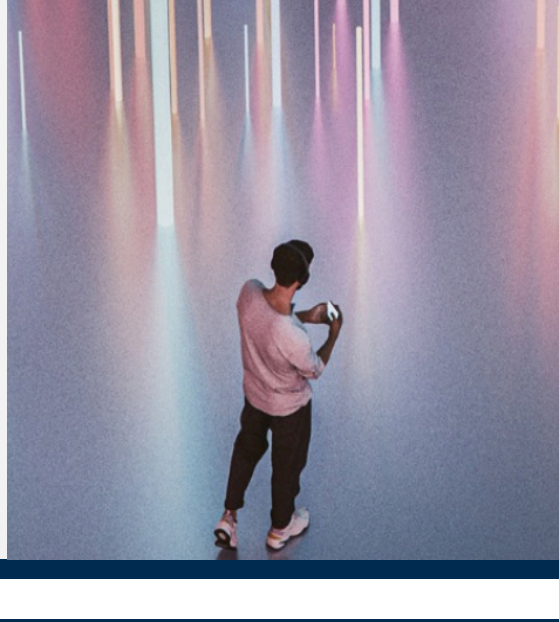
[Listen Here](#)

Lifestyle

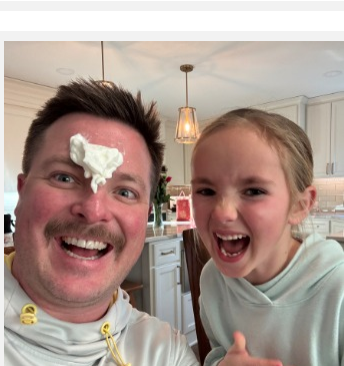
5 Ways to Protect Your Digital Footprint

You can't erase your digital footprint, but you can take steps to safeguard it.

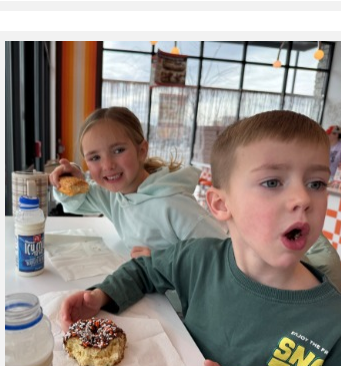
[Learn More](#)



January Happenings: What Have We Been Up To?



The Bouslog family has been having too much fun avoiding the arctic tundra recently. Coffee, donuts, and indoor games galore.

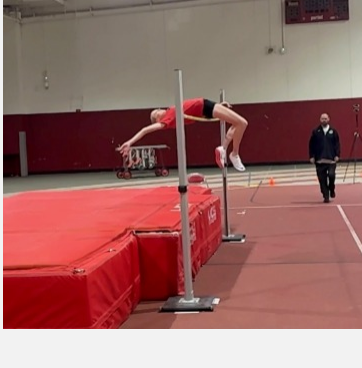


They managed to sneak a quick photo session in over Christmas (when the weather was nice!)



Every year Tom cooks up some Hoppin John on New Year's Day. Need to eat black eyed peas on NYD for good luck!

Raegan and Peter's daughter, Reese, jumped a personal best of 5'9" in the high jump at in indoor track meet at the beginning of January...a great start to her junior year!



Raegan caught a beautiful sunrise photo before work in mid-January!

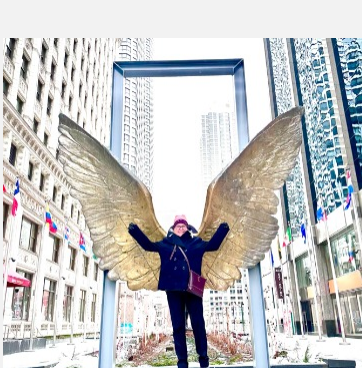


While avoiding the cold, Lisette got back into baking. Nothing like a good creme brulé!"



Priscilla and Steve spent a chilly weekend in Chicago...

Good thing the cold never bothered them anyway!



[Signature of Primary Contact]

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