



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 Service Associate, Tom Hunt, CFP® Financial Advisor, Zach Bouslog, QPFC Financial Advisor, Priscilla Sayeed CFA® Financial Advisor, Lisette Villalba Torres Client Service Associate.

[Client Preferred Name]

Welcome to the New Year! As we step into 2026, we are excited to share insights, updates, and opportunities that will shape our journey ahead. We look forward to another year together with you.

January Insights

Quarterly Market Essentials

[Click here to learn more](#)



Will 2026 Tame the Bull Market?

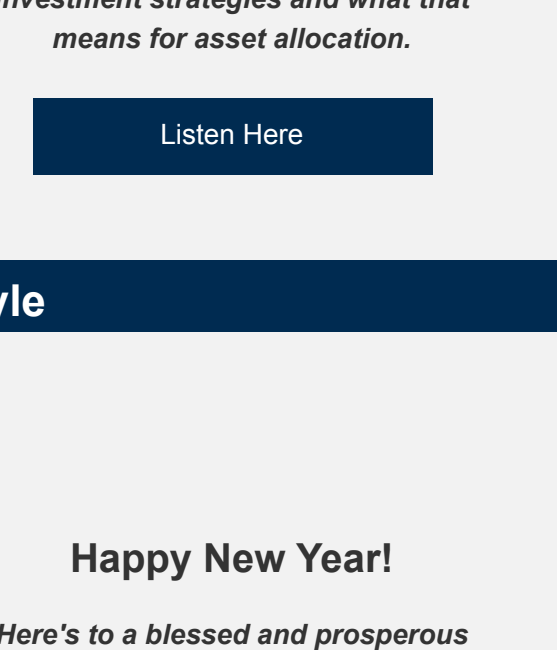
A resilient economy and strong corporate earnings are likely to drive continued equity gains in 2026. But these gains may be tempered, with optimism already priced into valuations and policy risks looming.

[Learn More](#)

2026 Investment Outlook: U.S. Stocks Shine in Spotlight of Favorable Conditions

Risk assets are poised for a strong year in a friendly policy and macroeconomic environment, with U.S. stocks outperforming peers. U.S. government bonds are likely to weaken after a rally in the first half of the year.

[Read the Article Here](#)



Rebalancing Portfolios as Risk Premiums Drop

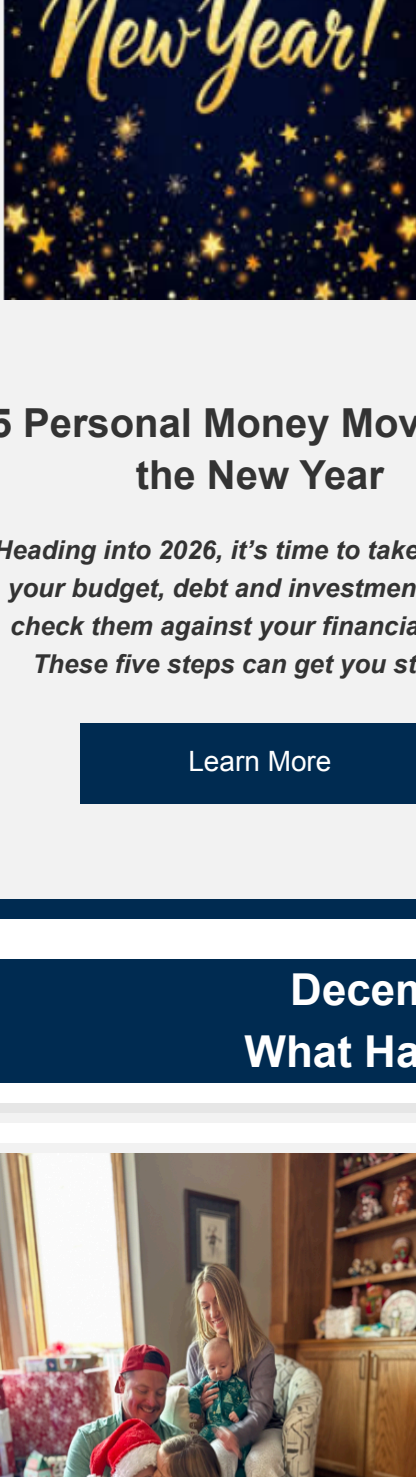
Our Chief Cross-Asset Strategist Serena Tang discusses how current market conditions are challenging traditional investment strategies and what that means for asset allocation.

[Listen Here](#)

Thoughts on the Market

Morgan Stanley

Lifestyle



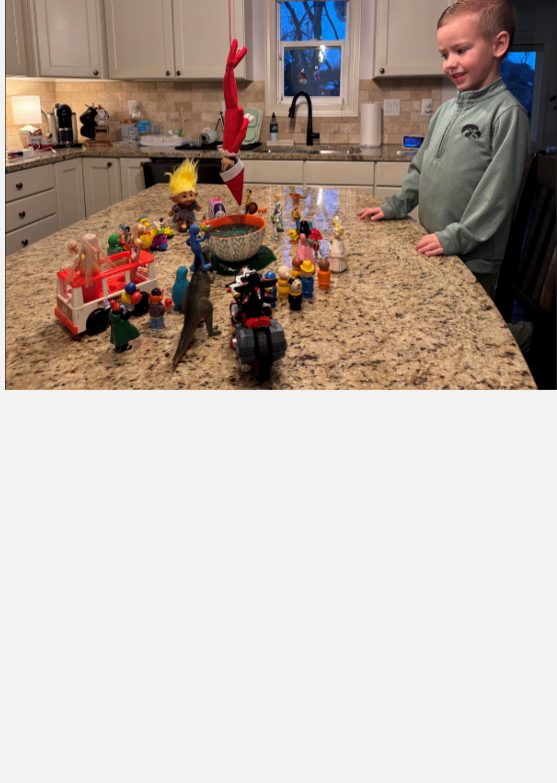
Happy New Year!

Here's to a blessed and prosperous 2026!

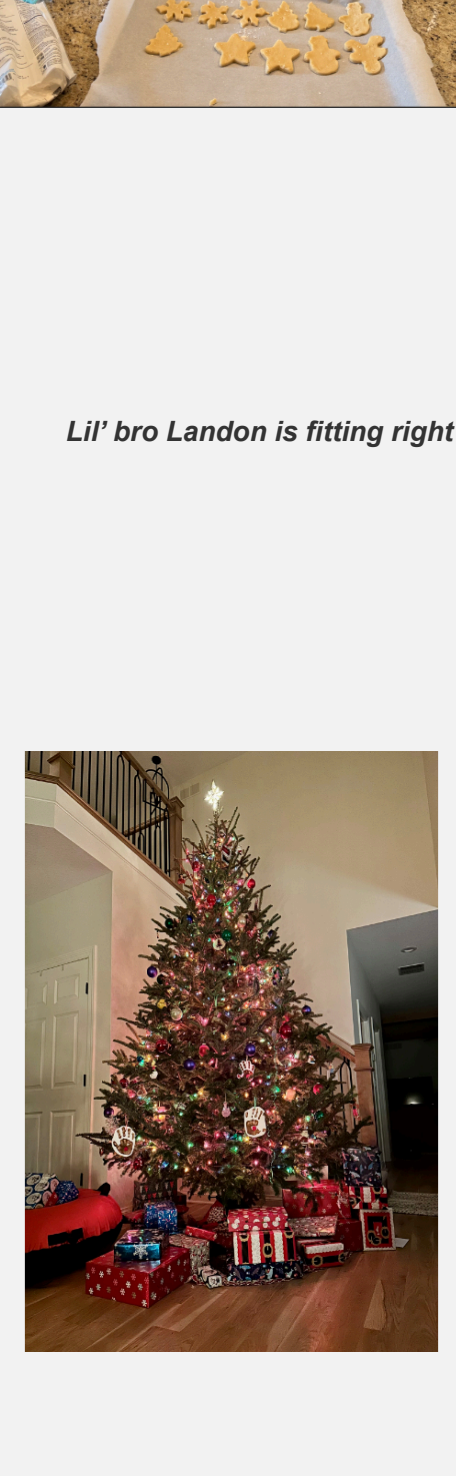
5 Personal Money Moves for the New Year

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.

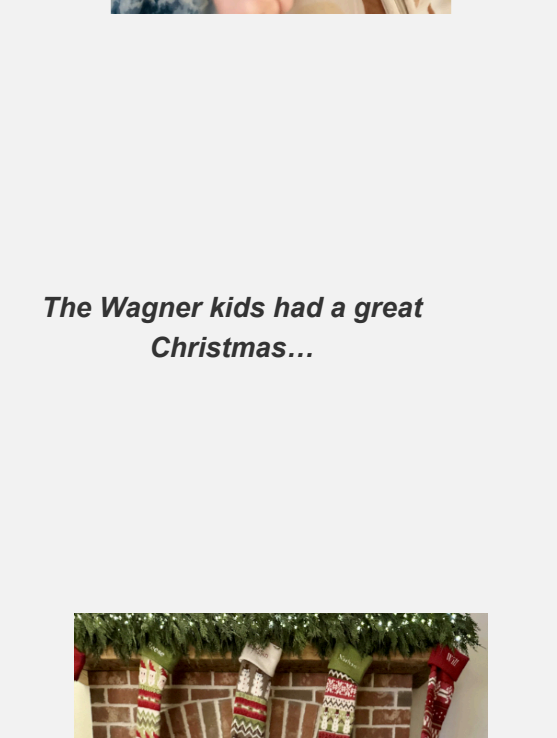
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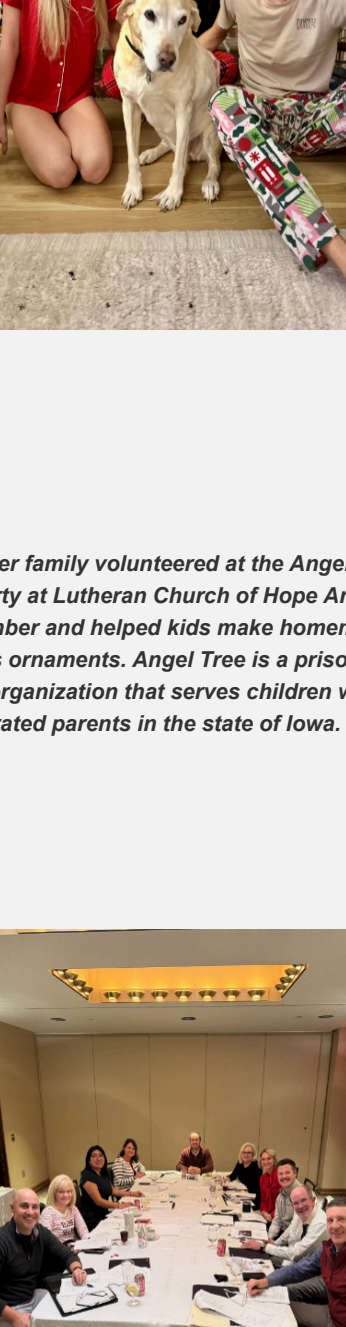
December Happenings: What Have We Been Up To?



The Bouslog family enjoyed their first Christmas as a family of 5!



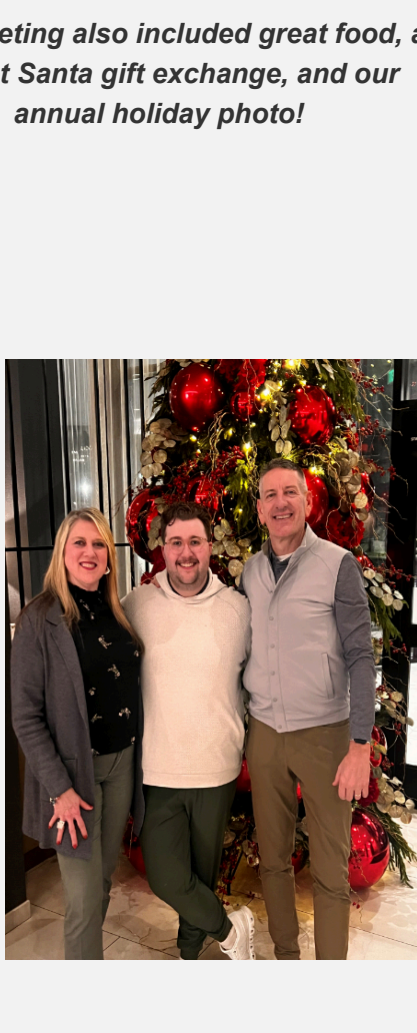
Lil' bro Landon is fitting right in.



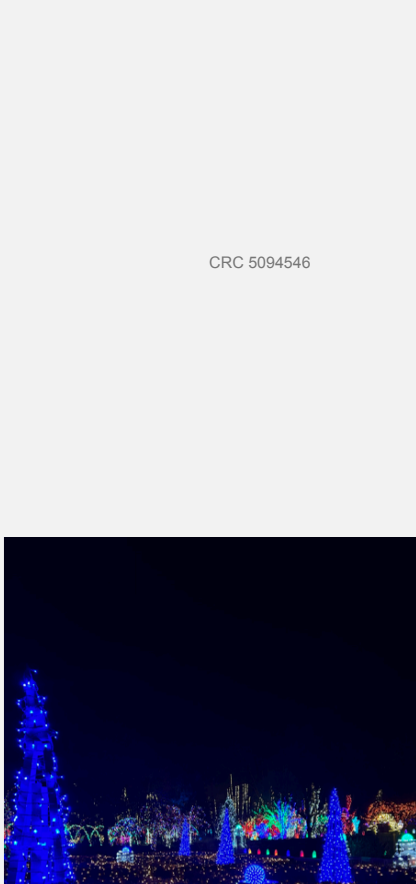
The Wagner kids had a great Christmas...



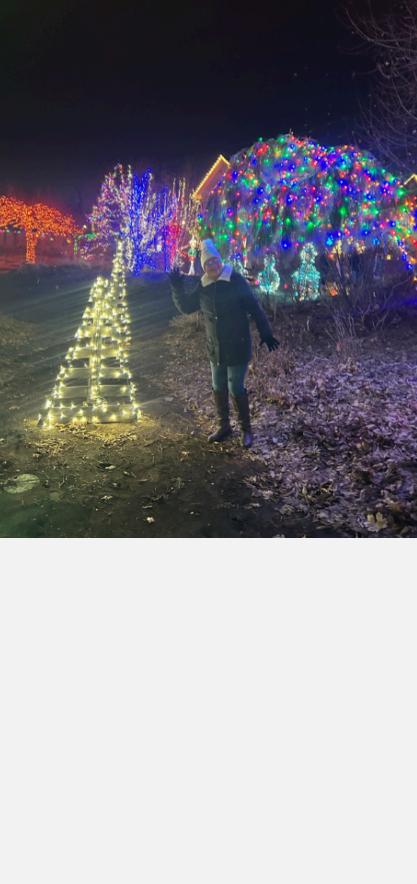
Sally (our yellow lab) wasn't too fond of getting her picture taken on Christmas Eve!



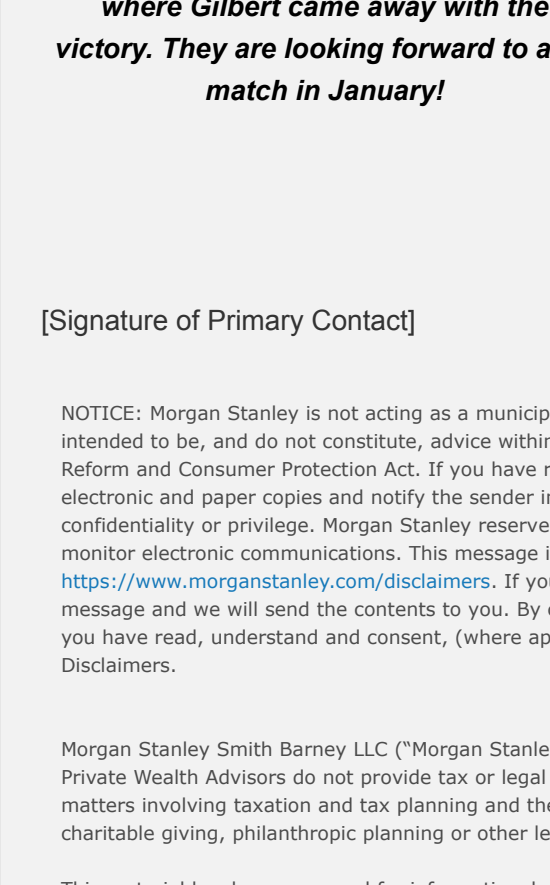
Raegan and her family volunteered at the Angel Tree Christmas party at Lutheran Church of Hope Ankeny in mid-December and helped kids make homemade Christmas ornaments. Angel Tree is a prison fellowship organization that serves children with incarcerated parents in the state of Iowa.



: Our team had its annual business planning meeting in mid-December... looking forward to continued growth and professional improvement in 2026!

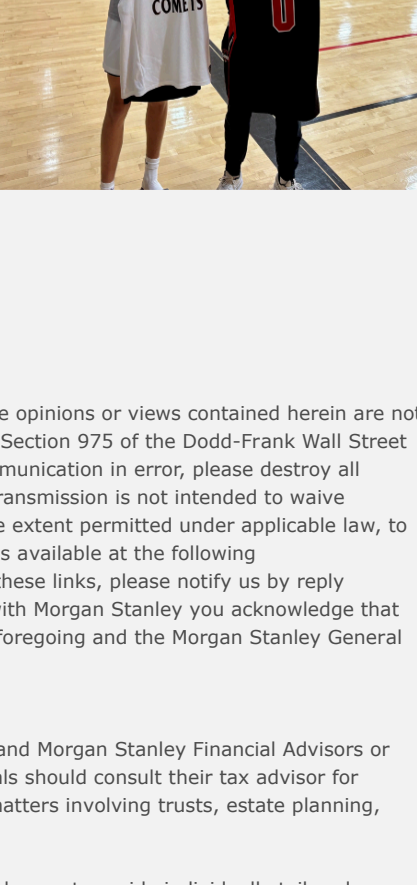


Our meeting also included great food, a secret Santa gift exchange, and our annual holiday photo!

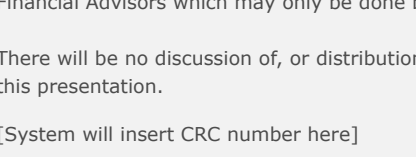


Karen & Tom were fortunate to spend Christmas with Jared in St Louis

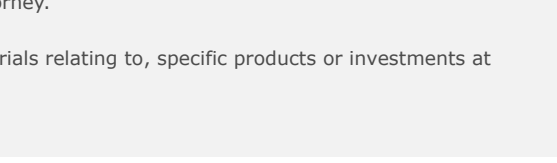
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Lisette and her family explored the annual holiday lights at the Janesville, WI Rotary Botanical Garden.



Matt's son, Blake, and Raegan's son, Nathan, played each other in a conference basketball game in December at North Polk High School, where Gilbert came away with the victory. They are looking forward to a re-match in January!



[Signature of Primary Contact]

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