

Quarter 2 Newsletter 2026



As the days stretch longer and the warmth of the season settles in, we hope you're finding time to enjoy everything this time of year has to offer. It's a natural point in the calendar to pause, take stock, and stay informed on the forces shaping the financial landscape.

In this quarter's newsletter, we've included a range of timely insights to help provide perspective. You'll find an update on the ongoing conflict in Iran and its impact on oil markets and the broader U.S. economy, along with a look at the growing influence of the "SHEconomy" and how women's increasing earnings, assets, and decision-making power are reshaping capital flows across markets. We're also sharing a piece that explores the recent loss of footing in 2026 markets and the factors investors may want to keep an eye on, as well as an article focused on ways to thoughtfully position investments with the goal of building wealth for the next generation.

As always, if you have any questions, thoughts, or simply enjoyed a particular article, we'd love to hear from you. Wishing you a great start to the season ahead.

Client Insights



Iran, Oil and the U.S. Economy

The Iran war's oil shock is rippling across inflation, rates and risk assets—and the 2026 midterms may hinge on how long higher crude prices persist.

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The Power Behind the SHEconomy

Women's earnings, assets and decision-making power are growing — reshaping where capital flows across the economy and markets. What could it mean for your portfolio?

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How 2026 Markets Lost Their Footing

Markets started the year with AI-driven optimism, but mounting uncertainty and the energy shock from the Iran war have complicated the outlook. What should investors do next?

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Don't Bury Your Kids in Taxes: How to Position Your Investments to Help Create More Wealth for Them

To minimize your heirs' tax burden, you need to focus on strategically aligning your investment account types and assets with your estate plan, as well as pay attention to the potential impact of RMDs.

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