

May 2026 Newsletter



As we head into May, we're bringing you a timely mix of market, planning, and operational insights to help you stay informed and prepared. This month's edition looks at the accelerating race to power AI—what's driving the competition across chips, data centers, energy demand, and investment, and why it matters for businesses and investors alike.

We're also spotlighting retirement planning, with a practical framework for getting started (or revisiting your strategy) and a set of crucial questions to ask—covering income needs, healthcare considerations, tax efficiency, Social Security timing, and how to stress-test a plan for different market and longevity scenarios.

On the geopolitical front, we've included a brief update on developments related to the Iran conflict and what to watch next, including potential implications for regional stability, energy markets, and broader risk sentiment.

In recognition of Celiac Awareness Month, you'll also find a gluten-free carrot soufflé recipe—an easy, seasonal addition to your table that doesn't compromise on flavor.

Finally, we're sharing an MSO resource highlighting the importance of logging external assets in the app and using DocuSign to support compliant, efficient workflows.

As always, if anything in this month's edition sparks a question or a conversation, I'm here and happy to connect.

Insights



Iran Conflict Unsettles Market Norms

The war has rattled stocks and shaken expectations about the usual market "rules." Here's what investors can learn from the episode.

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Energy Markets Race to Solve the AI Power Bottleneck

Artificial intelligence is on an exponential growth curve, but how will energy markets keep up with its insatiable demand for power?

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What Kind of Retiree Do You Want to Be?

Everyone has a different idea of their dream retirement. Whatever you envision, it's essential to plan ahead so that your nest egg will last.

[Learn More](#)

Discovery Corner

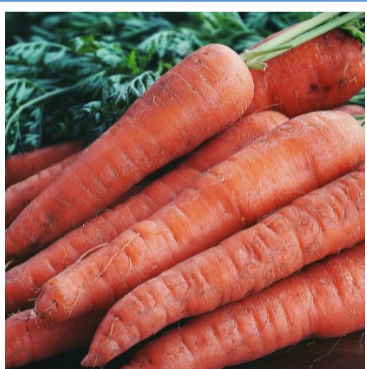
MSO & DocuSign

When documents live in too many places, it's easy for small tasks to turn into delays: searching for the right version, tracking what's been signed, and following up across busy schedules.

That's why we value tools like MSO and DocuSign for clients. They can help keep key documents organized and help make your financial journey more efficient.

[Learn More](#)

Seasonal Corner



Carrot Soufflé

Light, naturally sweet, and a comforting twist to a spring favorite.

[View Recipe](#)

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