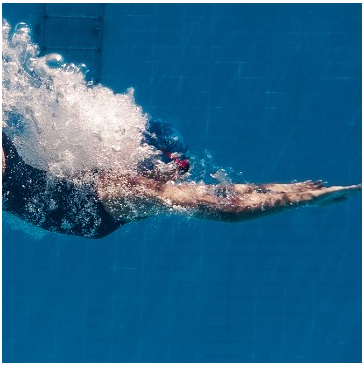




Pictured left to right: Bethany Justen Senior Registered Associate, Keri R. Burton, CFP®, CEPA®, Financial Advisor, Michael A. Pasqua, CFA Financial Advisor, Nicole Scanlon Financial Advisor

March 2025 Newsletter

Welcome to our monthly newsletter! Below you will find some useful resources and articles for you. If you would like to discuss any of the topics below or learn more on how we can help you work towards your financial goals, please do not hesitate to reach out.



Should Investors ‘Buy the Dip’?

Market volatility continues amid rapid policy shifts though this may offer new opportunities for investors. Here are three strategies to consider and, as always, feel free to reach out to discuss further.

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Trump's Tariff Agenda

President Trump has signed over 65 executive orders since Inauguration Day. Monica Guerra, Head of US Policy for Wealth Management, shares her framework for considering this wave of executive orders and highlights key takeaways from recent tariff actions.



Learn More



The Growing Opportunity in Private Markets

Companies are spending more time under private ownership and creating more value for private shareholders in the process.

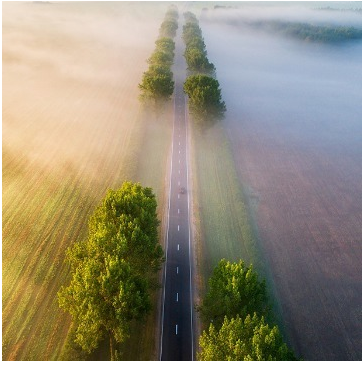
Learn More

Are You Prepared for Tax Day?

Tax Day is rapidly approaching! The sooner you get started, the better prepared you'll be for Tax Day.



Learn More



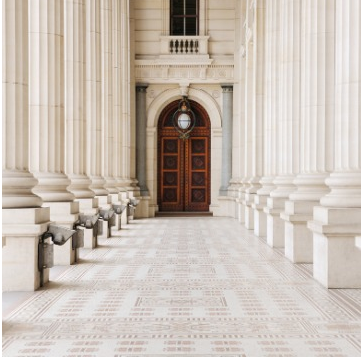
On the Markets: In Like a Lion

"American exceptionalism" takes a pause as policy risks, sticky inflation and international rotation weigh on US equities. Find out more in On the Markets.

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US Policy Pulse: Deregulation Risks and Opportunities

In this report, Morgan Stanley Research discuss the potential economic and market outcomes of increased federal deregulation.



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