

April Newsletter

[Client Preferred Name]

Welcome to our April Newsletter!

As spring settles in and routines start to shift, April is a natural moment to refresh what matters, both personally and financially. It's a good time to revisit goals, check progress against your plan, and make a few thoughtful adjustments where needed.

In this April edition, we're sharing a set of practical, easy to digest reads designed to support confident decision making: 6 Steps to Financial Literacy, insights on what your tax return reveals, and a helpful explainer on what tax loss harvesting is and how it may fit into a broader strategy.

We're also mixing in a few fun seasonal highlights, because planning isn't only about the numbers. Look out for tips on fruits and veggies to plant in April and 20 new recipes to try this month, perfect inspiration as the days get longer and schedules get busier.

INVESTOR INSIGHTS | APRIL 2026

5 Ways To Refresh Your Finances This Spring

If you're using this season to clean out your closets and your home, don't forget to also tidy up your finances.

[See How](#)

April Insights:



6 Steps to Financial Literacy

Budgeting. Retirement. Investments. A lot goes into managing your personal finances. A strong foundation can help.

[Learn More](#)



What Your Tax Return Reveals

Examining your tax return may reveal opportunities to save money hidden between its lines. You may be surprised by what you find.

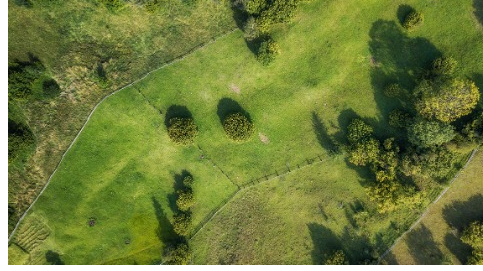
[Learn More](#)



Not So Risky Business

What if there were a resource that could show you where your investment exposures are and how they might affect your returns in different scenarios?

[Learn More](#)



What Is Tax-Loss Harvesting?

What is tax-loss harvesting exactly, and how do some investors use it to opportunistically reduce their tax bills?

[Learn More](#)

Check Out Our Latest Virtual Events

Register for upcoming events or catch up on the most recent economic and market trends.

[Watch Now](#)

April Highlights:



11 Last-Minute Spring Getaways You Can Still Book

[Learn More](#)



Plant These Fruits and Veggies in April

[Learn More](#)



20 New Recipes to Make in April

[Learn More](#)

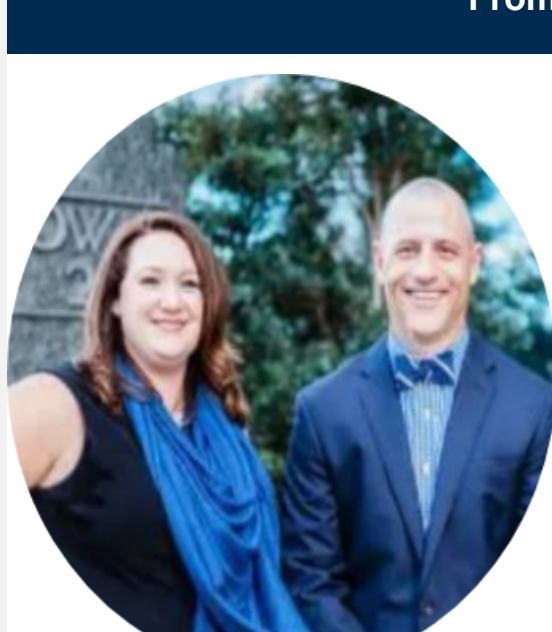
Real Client Impact. One Integrated Firm.

See our operating model in action, delivering coordinated expertise that drives meaningful growth for our clients.

[Watch the Series](#)

THE
MORGAN STANLEY
BLUEPRINT

From Our Team:



The Powell Humphrey Group

Walter Powell, CRPC®

Financial Advisor

Danielle Humphrey

Financial Advisor

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Thank you for your support! We appreciate you taking the time to read our April newsletter, and we hope you found the insights valuable. As always, please don't hesitate to reach out with any questions or if there's anything we can help with.

Sincerely,

[Signature of Primary Contact]

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Tax-loss harvesting. IRS rules stipulate that if a security is sold by an investor at a tax loss, the tax loss will not be currently usable if the investor has acquired (or has entered into a contract or option on) the same or substantially identical securities 30 days before or after the sale that generated the loss. This so-called "wash sale" rule is applied with respect to all of the investor's transactions across all accounts.

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2000 Westchester Avenue, Purchase, NY 10577-2530 USA

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