

As April unfolds, we've put together a thoughtful mix of insights and practical guidance to help you stay informed and supported in today's evolving landscape.

In this edition, we explore the ongoing developments in Iran and what they may mean for markets, share meaningful ways to help a loved one navigate the path to homeownership despite today's higher rates and home prices, and highlight 3 questions that reveal if you're actually ready to age in place.

You'll also find helpful resources at the end of this newsletter, including step-by-step instructions for accessing your tax documents and navigating DocuSign with ease.

As always, if anything sparks a question or you'd like to talk something through, we're here for you and always happy to help in any way we can.

Warm regards,

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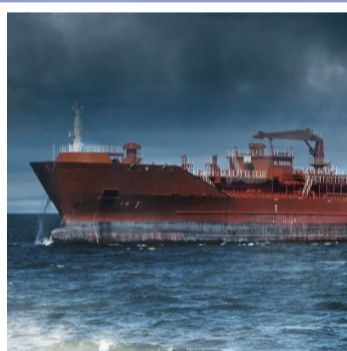


Named Forbes Best-In-State Wealth Management Teams 2023-2026

Source: Forbes.com (Awarded 2023-2026). Data compiled by SHOOK Research LLC based on 12-month time period concluding in March of year prior to the issuance of the award.

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Insights



U.S.-Iran Truce: What's Next?

While a tentative ceasefire in the Middle East holds, the Strait of Hormuz continues to be a sticking point in diplomatic efforts. Our Deputy Global Head of Research Michael Zezas and Head of Public Policy Research Ariana Salvatore walk through some scenarios that could play out.

[Learn more](#)



Helping a Loved One Buy a Home

High home prices and mortgage rates are putting the dream of homeownership out of reach for many would-be buyers. Learn how you can help a loved one break into a tough market.

[Learn more](#)



3 Questions That Reveal if You're Actually Ready to Age in Place

Is your "forever home" actually a "Peter Pan house?" The age-in-place dream often hits these three unexpected roadblocks.

[Learn More](#)

Accessing Tax Documents and DocuSign

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