

May Newsletter 2026



As we move through May, it's a great time to take stock of the decisions that shape your financial life, your legacy, your career transitions, and the tools you use to stay organized.

In this month's newsletter, we're sharing timely reads on how to approach estate planning with purpose, how to avoid leaving money behind when exiting a job, and a clear primer on cryptocurrency. We're also including a practical resource that walks you through connecting external assets to streamline your overall financial experience, support more informed recommendations, and navigate DocuSign with confidence.

If you have any questions or would like to connect, please feel free to reach out at your convenience.

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.

[Awards Disclosures](#)

Insights



What Is Cryptocurrency? A Guide to Cryptocurrency Investing and Risks

Learn what cryptocurrency is, how to invest and its risks.

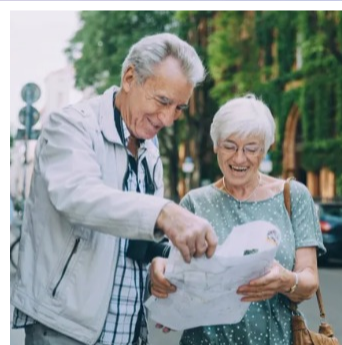
[Learn more](#)



Don't 'leave money behind' when you exit your job - how to get what you're owed

If you've recently left a job — either voluntarily or as the result of a layoff — your workplace retirement account is just one of the things worth double-checking.

[Learn more](#)



Why Finding Your Legacy Tribe Will Help You Map Out Your Estate Plan

Before you look at your net worth, look in the mirror — your philosophy on life will inform your legacy, and understanding that first will allow a meaningful estate plan to unfold.

[Learn More](#)

Navigating MSO and DocuSign

[Learn More](#)

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