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April 2025 Newsletter

Dear Valued Clients and Friends,

This month, we're focusing on **financial literacy** for all generations. We invite you to explore The Money Playbook and encourage your kids or grandkids to join our Wealth Education for the Next Generation webinar, where we'll cover the importance of financial planning.

We're also diving into key market trends, including what's driving volatility and how tariffs are reshaping global markets.

Solaria and Ross

April Insights

How to Handle Volatility

Market volatility can increase or decrease depending on where we are in the business cycle. Learn how to recognize common investing mistakes and stay focused on your long-term financial goals.

Learn More

Four Ways Tariffs Are Reshaping Markets

Discover what the Trump administration's tariffs could mean for key equity sectors and how investors can navigate the risks and opportunities.

Learn More

Tariffs and Turbulence

Given the developing news flow around tariffs, we have created a consolidated, global playbook for investors that provides analyses, and stock assessments across sectors.

Learn More

April – Financial Literacy Month

Money Playbook

Expanding your financial literacy is an ongoing journey, we want to empower you with the knowledge to help make smart financial decisions throughout every stage of your life.

Attached is a Playbook that inspires honest conversations about money and the role money plays in your life. This playbook breaks up important financial topics into chapters, any of which you can review.

Your Guide To Life and Money

Financial Planning

Managing your finances is about more than managing your investments. We can support you in many aspects of your financial life – including budgeting, cash management, retirement planning and other financial goals.

Action item: Reply **"Let's Schedule"** to schedule a meeting and start your financial planning session today.

Learn More

May 5 - Wealth Education for the Next Generation Webinar

Topic: Money & Saving: Financial Planning and Why It Matters to Me

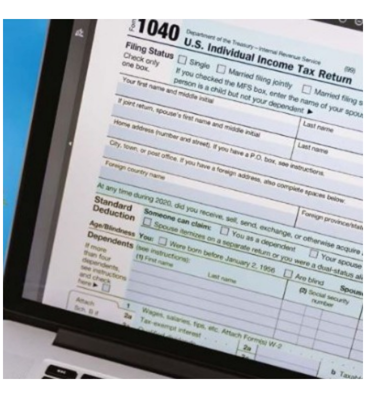
Webinar Date and Time
Monday, May 5th, 2025
1:00 p.m. – 2:00 p.m. PT / 4:00 p.m. - 5:00 p.m. ET

Register Here

April Calendar

April 12–20 - Passover

Wishing a joyful and meaningful Passover to all who celebrate! May this season of reflection and renewal bring peace and happiness.



April 15 - Tax Day

A reminder that today is the tax filing deadline—hope you've got everything squared away!

April 20 - Easter Sunday

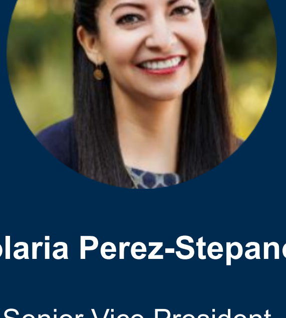
Wishing everyone a joyful Easter filled with hope, renewal, and time with loved ones!

April 22 - Earth Day

Investing in our planet is investing in our future. This Earth Day, let's commit to small actions that create a lasting impact—because every choice counts.

Monthly Quote

"If we command our wealth, we shall be rich and free; if our wealth commands us, we are poor indeed."
- Edmund Burke



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