



## The Volpei Zimmerman Group Quarterly Newsletter



Team Photo (left to right): Molly Ryan: Senior Registered Associate; Rashaan Coleman: Financial Advisor; Brandi Zimmerman: Vice President, Wealth Management, Financial Advisor; Brian Volpei: Senior Vice President, Wealth Advisor, Family Wealth Director, Portfolio Management Director; Vikki Valle: Assistant Vice President; Ethan Kim: Client Service Associate

We are very pleased to share the March edition of our newsletter. We have included insights about the upcoming general election, important information about investing trends in 2024, and reminders for tax season. We encourage you to share the articles with your friends and family. As always, please reach out to us if we can be of assistance.



### 5 Unexpected Investment Ideas for 2024

Consider these contrarian views on key topics of interest to investors, including airline demand, copper supply, decarbonization's investment potential and more.

[Read More](#)

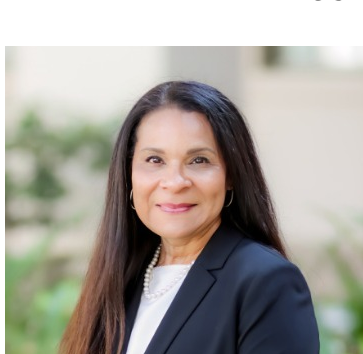


### The End of Easy Money

The liquidity that fueled 2023's equity rally is apt to fade this year. What could it mean for your portfolio?

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## Team Spotlight: Vikki Valle



Vikki Valle: Assistant Vice President  
Wealth Management Associate

Join us in congratulating Vikki on her well-deserved promotion to **Assistant Vice President!** Her dedication and commitment has not only kept our team running smoothly, but she has had a positive impact on each and every one of our clients. Her commitment to excellence is truly inspiring, and we look forward to seeing her continued success.

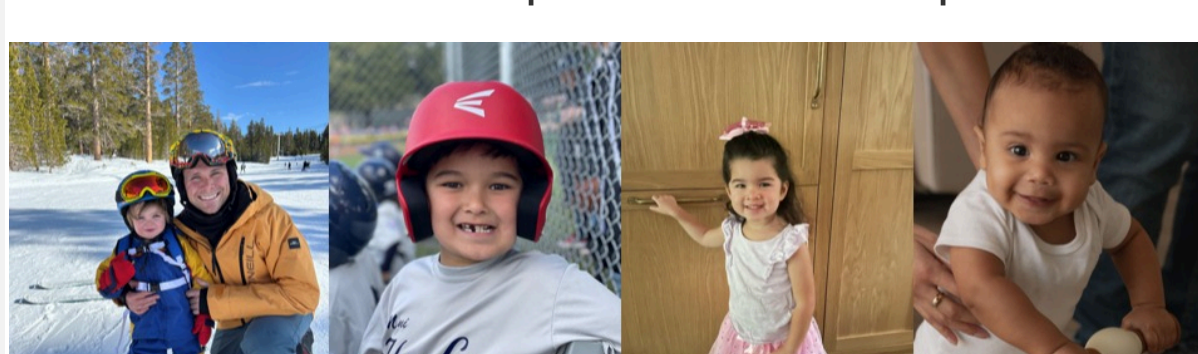


We are proud to share **The Volpei Zimmerman Group at Morgan Stanley has been named to the 2024 Forbes Best-In-State Wealth Management Teams list**

Forbes Best-In-State Wealth Management Teams

Source: Forbes.com (Awarded Jan 2024) Data compiled by SHOOK Research LLC based for the period 3/31/22-3/31/23.  
<https://www.morganstanley.com/disclosures/awards-disclosure.html>

## Kids of The Volpei Zimmerman Group



Pictured Above: Parker Volpei, Brian Volpei - Senior Vice President, Wealth Advisor Takeo Zimmerman, Sloan Zimmerman,, Jeaven Coleman

This winter brought a lot of firsts...

Parker Volpei (age 3) took to the slopes with his Dad, Brian, this winter!

Takeo Zimmerman (age 5), had his first time at bat, and Sloan Zimmerman (age 2) is excited for her first dance class when she turns 3 in April.

Jeaven Coleman (11 months) loved his first bike, bringing joy to everyone who witnessed his little adventures.

## Quick Market Updates



### Thoughts on the Market Podcast

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### 401(k) and IRA limit increases for 2024

The amount individuals can contribute to their 401(k) plans in 2024 will increase to \$23,000 -- up from \$22,500 for 2023.

Furthermore, IRA limit rises to \$7,000 in 2024 -- up from \$6,500.

[Read More](#)



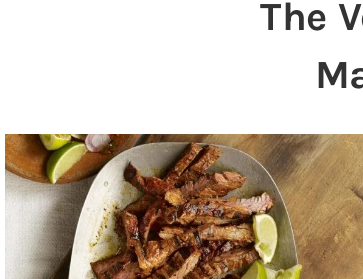
### Election 2024: Investors' Top Questions Answered

The outcome of this year's U.S. election could have a big impact on taxes, Social Security and health care policy. What should investors know?

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## The Volpei Zimmerman Group

### March Recipe Highlight



### Chile-Marinated Skirt Steak

In this Mexican-inspired steak recipe, dried chiles are toasted, soaked and pureed to make a flavorful marinade.

[Recipe](#)

The Volpei Zimmerman Group

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