



July Newsletter

The term "Artificial Intelligence" was first coined back in 1956 by John McCarthy, an American computer scientist.

Typically we think of the start of summer as a time when things slow down. That has not been the case this June. A lot of big headlines still coming out of the Iran conflict, but oil prices have dropped dramatically which is a great sign.

SpaceX delivered the largest IPO in history, the World Cup has taken over many U.S. Cities, and as a lead up to the America 250 celebrations we had a UFC fight at the White House. Markets have shown resilience and have recently reached new highs. If you have questions on your account specifically, you know where to find us.

In the meantime, we hope that you all have a great and relaxing time celebrating the 250th Anniversary of the greatest country on earth!

Innovation and Impact: Defining the Next Phase of Growth

Leaders at Morgan Stanley's Innovation & Impact Summit explored how AI, robotics, energy and healthcare technologies are reshaping industries, investing and long-term economic growth.

[Read Here](#)



Media and Beverages Score at World Cup

The 2026 FIFA World Cup could drive revenue opportunities across media, plus potential gains across consumer sectors and the broader economy.

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Celebrating America's 250th Birthday



As America celebrates its 250th birthday this July, we're reminded that many of life's greatest achievements are built over time.

Just as our nation's story has been shaped by generations of planning, perseverance, and vision, financial success is often the result of thoughtful decisions made today for a stronger tomorrow.

July Highlights



Fun Facts: Celebrating 250 Years of America

[Read Here](#)



Family Picnic Essentials

This guide will walk you through a comprehensive family picnic essentials checklist, covering everything from food and drinks to gear and safety measures.

[Read Here](#)



18 Fun Ideas for Celebrating Summer at Home

Eighteen ways to brighten and—let's face it—fill up the weeks ahead

[Read Here](#)



From Left to Right: Sean R York, Senior Vice President, Investment Management Consultant; Maddie Johnston, Registered Client Services Associate; John Polley Vice President, Senior portfolio Manager, Branch Manager

[Our Website](#)

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