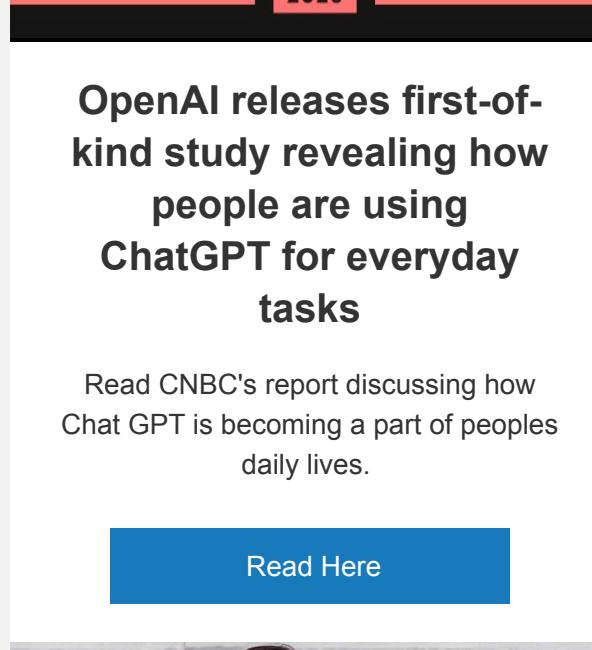




January Newsletter

Fun Fact: Did you know that 71% of all images you see on social media are now AI generated?

As we navigate the digital landscape of 2026, it's crucial to recognize that a significant portion of online imagery is AI-generated, which can shape perceptions and influence decision-making processes. This highlights the importance of critical evaluation and discernment in our interactions with digital content. Every New Year comes with its own opportunities and uncertainties. January is a great time to get your finances organized in preparation for whatever comes. There are numerous investment opportunities available to help enhance your financial plan. We invite you to schedule some time with us to explore how we can support your financial goals and make the most of what 2026 has to offer. Whether you are looking for growth, income, tax efficiency, or insurance planning, reach out to schedule some time with us so we can help you take advantage of whatever 2026 may bring!



Forbes America's Best Companies 2026

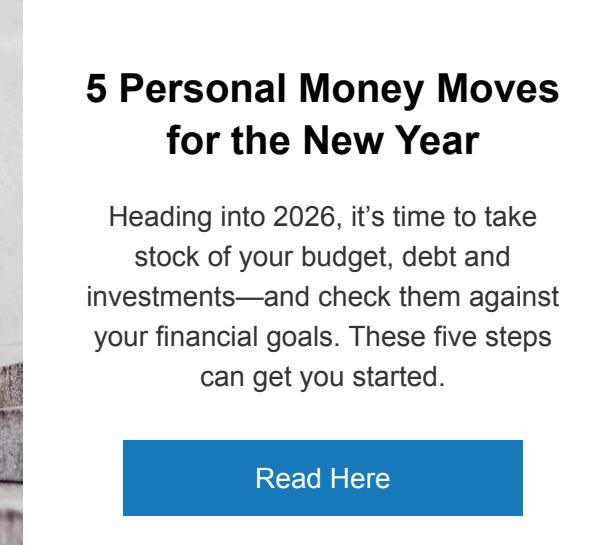
Morgan Stanley has been recognized as America's no. 4 best company to work at. This is based on an evaluation of more than 100 different metrics including company size, financial performance, customer and em

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OpenAI releases first-of-kind study revealing how people are using ChatGPT for everyday tasks

Read CNBC's report discussing how Chat GPT is becoming a part of peoples daily lives.

[Read Here](#)



5 Personal Money Moves for the New Year

Heading into 2026, it's time to take stock of your budget, debt and investments—and check them against your financial goals. These five steps can get you started.

[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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