June 2023 Newsletter

Summer has almost arrived, and we hope you enjoy the warmer weather, the abundant fruits and vegetables, and the greater opportunity for outdoor activities. In this newsletter, we identify the importance of insurance for wealth protection as well as a tool for charitable giving. We also provide an equity and fixed income update.

Insurance

You've worked hard to build your family's wealth; that's why protecting it is a key priority to ensure you are prepared to meet your current and future wealth management goals and commitments. *Protecting Your Wealth*, discusses several considerations to help safeguard and enhance your wealth.

Charitable giving is an important wealth planning consideration for many. While making a charitable donation using cash or publicly traded securities are common gifting strategies, you may want to consider an insurance strategy, which can often increase the benefits of your donation dollar.

Planned Giving – Optimize Your Gifting Strategy With Insurance discusses several strategies for maximizing your charitable donation using insurance.

Market Review

This summary provides a stock and fixed income forecast.

Sincerely,

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