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3. Friday Footnotes

New Technology

You all received a preview of our new meeting confirmation process this week, albeit on accident! Sorry about that! We're still working out the kinks.

For 2025, once you schedule an appointment with Krista, she will send a meeting confirmation email. A week prior to your meeting, you will receive an agenda and documents request.

We appreciate your patience as we work to be more process efficient!

2025 Market Outlook

Vanguard

Still Sound Money:

As interest rates return toward neutral, we expect them to settle at higher levels than the 2010's. This environment sets the foundation for solid cash and fixed income returns over the next decade

US Economic Resilience:

Positive labor supply and productivity developments drove US growth in 2024. Whether these drivers wane or accelerate, coupled with demand factors such as stimulus, holds the key in 2025.

Growing Market Tension:

The possibility that we are experiencing a valuation-supporting productivity boom must be balanced by the risk that economic developments could expose the vulnerability of stretched equity valuations.

Click HERE for the full report.

2024 TAX PLANNING CHECKLIST

BOOKENDS
FINANCIAL PLANNING
for every chapter of your life

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