



Sucré-Vail

Wealth Advisors[®]

Achieving Financial Wellness without Unnecessary Risk

Crossing your T's in 2023

The final two months.

That's right, holiday shoppers, we're down to 7 weeks left in 2023.

And as we quickly approach the end of the year, it's natural to pause and reflect, taking a moment to recognize what you've been able to accomplish so far, and let that then spur you to start dreaming and doing what you still want to achieve.

That's why this week is the perfect time to focus on some end-of-year financial to-do's. The time you take now to gain order and clarity can have a significant impact on your overall financial wellbeing and, more importantly, set you on the right footing in 2024.

Plus, there's just a certain sense of peace of mind that comes with knowing you've crossed all your financial T's in Two Thousand Twenty-Three.

To help you get started, check out the timely articles below and see if anything resonates with you. And as always, if you have any questions or need further guidance, let's connect.

Thanks,

Margaret & Henry



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Maximizing Your 2023 Year-End Tax Planning Benefits

Nov. 6, 2023

F It's never too late to start planning, and with the right approach and resources, you can make...

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Nov. 2, 2023



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Nov. 6, 2023

BI Despite feeling the season's crunch, one thing for sure to avoid is overspending and digging a...

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Nov. 6, 2023



While many people can't afford to retire in their 50s or early 60s—and others don't want...

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