



# Sucre-Vail

## Wealth Advisors<sup>®</sup>

Achieving Financial Wellness without Unnecessary Risk

### How to approach September

Remember what it was like walking into school for the first time? There's so much excitement and possibility in the air, and of course some nervousness-maybe even anxiety. That particular feeling of not knowing what to expect in September stays with you, especially this year as we mark 20 years since the Sept. 11 tragedy.

Amid all of the uncertainty this time of year, I've found that what helps quell anxiety is to focus on what is certain and what you can control. Now is a great time to check in with yourself. Take a deep breath and answer honestly:

- Are you where you want to be?
- Are your loved ones provided for?
- What can you do right now to improve or safeguard your future?
- Do you know your limits? That goes for tax withholding limits on your 401(k) or IRAs as well.

It's best to take steps now so there are no surprises later this year. As always, I'm here to answer any questions about your strategy. These articles can also help you get in the right frame of mind for this time of year. I'd love to hear what you think. Let's connect soon.

Thanks,

Margaret & Henry



**Margaret R Sucre-Vail, AIF® AWMA®**  
Advisor

**Sucre-Vail Wealth Advisors**

Office : [888-286-9991](tel:888-286-9991)

[margaret@sucrevailwa.com](mailto:margaret@sucrevailwa.com)

[www.sucrevailwa.com/](http://www.sucrevailwa.com/)



[Schedule a Meeting](#)



## Your Finances Took a Hit From the Pandemic. Here's What You Do Now.

Sept. 7, 2021



Maybe you lost your job. Maybe your hours were cut. Or maybe you had to take over caregiving...

[Read more](#) →



## Investors Are Ignoring the Tax Elephant in the Room

Sept. 3, 2021



April 15 is still more than seven months away, but it's time to start thinking about taxes. Not...

[Read more](#) →



## What You've Lost in This Bull Market

Sept. 3, 2021



Investors who no longer fear their bets could explode are seeking out risks they don't have to take.

[Read more](#) →



## Why You Need to Protect Your Sense of Wonder — Especially Now

Sept. 3, 2021



We may be slowly returning to our offices (more or less), but the strains of the pandemic are...

[Read more](#) →



## What's The Shape Of Your Life?

Sept. 1, 2021

**F** We make meaning of our lives in the way we tell our tales. What shape would you give yours? A...

[Read more](#) →



## It's a New Season of Uncertainty. Train Your Brain to Be Resilient.

Sept. 3, 2021



The start of a new, post-pandemic normal many of us expected this fall isn't happening. Finding...

[Read more](#) →

16862 Royal Crest Dr - Houston, TX.77058

Financial planning and registered investment advisory services are provided by Sucré-Vail, Inc. and under contract with Sucré-Vail Wealth Advisors. Sucré-Vail, Inc. its principals and or employees are not engaged in the practice of law, nor are we licensed to do so. Communications with any principals and or employees are not intended as legal or tax advice, or may they be construed or relied upon as such. Securities, Tax, Investment Advisory & Financial Planning Services are offered by Sucré-Vail Wealth Advisors an RIA Firm, member FINRA/SIPC. Copyright 2021 FMG Suite. Securities, Tax, Investment Advisory & Financial Planning Services are offered by Sucré-Vail Wealth Advisors an RIA Firm.