



Sucré-Vail

Wealth Advisors[®]

Achieving Financial Wellness without Unnecessary Risk

Heat Advisory: Lessons From Taking the Temperature of Markets

Amidst the scorching summer days, let's take a moment to check your financial temperature.

Just as monitoring your body temperature can help detect disease or sickness, so can monitoring these 3 factors in your financial wellness:

- Net income
- Cash reserve
- Revenue sources

Have any of these changed recently for you? If so, we can put a new strategy in place tailored to your distinct needs and goals.

With the seesawing economic conditions we've encountered over the past few years, it's crucial to maintain a deep understanding of your financial health and wellness. Doing so helps you make informed decisions and positions your portfolio for success – however you'd like to measure it.

Read the articles below to explore what's happening in the economy this week and how it relates to your finances. As always, please feel free to reach out to me with any questions or concerns. Together, we can navigate these hot markets and keep you cool, calm, and collected on the path to pursuing your long-term goals.

Thanks,

Margaret & Henry



Margaret R Sucré-Vail, AIF® AWMA®

Advisor

Sucré-Vail Wealth Advisors

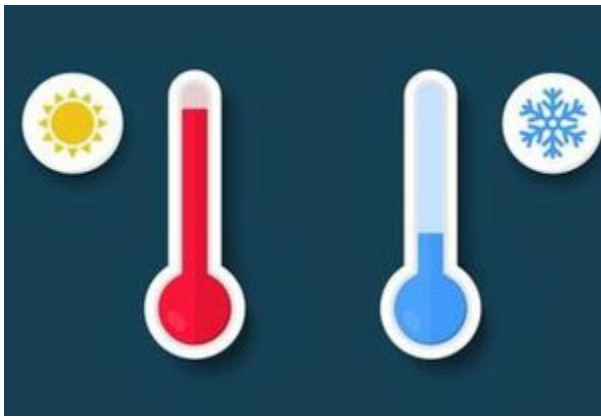
Office : [888-286-9991](tel:888-286-9991)

margaret@sucrevailwa.com

www.sucrevailwa.com/



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Investor lessons from taking the temperature of markets

July 10, 2023

FT

Superior investment results come from exploiting the differences between how things are supposed...

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If You Find the Economy Confusing, Don't Worry: It Is

July 14, 2023

WSJ

Puzzled investors should diversify and hope to do just OK in any scenario.

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The Point You Become Financially Independent

July 17, 2023

F

If you want to become financially independent, you've got to know what it means to be financially...

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Inherited IRAs Just Got New Rules. What You Need to Know.

July 18, 2023

B

Under new guidance, the IRS is allowing people who inherited an individual retirement account...

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How Much Income You Need to Crack America's Richest 1%

July 13, 2023

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A new study used IRS data to determine what it takes to be among the wealthiest households in the...

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How to Make a Staycation Feel Like an Actual Break

July 13, 2023

T

A 'mental flip' can help make your time off more restorative, even if you're not traveling far.

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16862 Royal Crest Dr - Houston, TX.77058

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