



Sucré-Vail

Wealth Advisors

Achieving Financial Wellness without Unnecessary Risk

A game-changing fourth quarter

October marks the start of a fresh quarter — the last one of the year. Knowing you only have 3 months left in 2022, what are you feeling pressed to accomplish?

Entrepreneur Michael Altshuler captured the familiar 4th-quarter feeling in this way: “The bad news is time flies. The good news is you're the pilot.”

Let's get your goals off the ground and fly.

Now is a great time to connect if you're in need of a strategy session heading into the year's final stretch or if you have any questions about what's on the horizon for 2023. Where could you use additional information, encouragement, or support? I can assist.

Check out Forbes' 2022 year-end checklist below for ideas and a list of investing do's and don'ts. I've included some additional articles as well with important news from the financial world this week. Let me know what you think.

Thanks,

Margaret & Henry



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Tempted to Time the Market? Look at These Charts First

Sept. 28, 2022

B

Emotional reactions and rising volatility can be a bad mix when it comes to financial health.

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Three Rules For Successful Bear Market Investing

Oct. 4, 2022

F

Being an investor during bear markets is challenging. Making it through to the rebound requires...

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How to Invest for the Next 10 Years

Sept. 29, 2022

B

The investment landscape is shifting. Turbulent times may be here to stay. Here's how to build a...

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2022 Year-End Financial Checklist

Sept. 30, 2022

F

Fixating on short-term performance is not constructive. Instead, review these pragmatic...

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Three Ways You Can Cash In on Cash

Sept. 30, 2022



Keeping a portion of your portfolio safe and liquid no longer means settling for nothing—as long...

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Shoulda, woulda, coulda: why FOMO won't let go of us

Oct. 4, 2022



The pandemic suspended our fear of missing out. Did it also teach us how to handle it better?

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