



Sucré-Vail

Wealth Advisors[®]

Achieving Financial Wellness without Unnecessary Risk

The best way to spread holiday cheer ...

Tis the season! And with it comes the age-old quandary: what do we give our loved ones? While traditional gifts such as toys and games, gift cards, and vacations are popular choices, consider giving a financial-related present. It could be the best gift of all, one that keeps on giving long after the holiday is over.

Financial gifts have the power to positively impact the recipient's future. For younger people, contributing to a college fund or opening a savings account in their name can help set them up for success. For seniors, gifting shares of stock or a contribution to retirement savings can make the golden years even more enjoyable. Now is an opportune time to make your tax-deductible charitable donations as well.

Let's discuss the possibilities, which can be tailored to suit each person's age and needs. Whether it's teaching kids about the importance of saving or helping adults invest in their future, these gifts can make a lasting difference.

For more money inspiration, check out the articles below. Who knows, you may just find the perfect gift that makes you unforgettable in someone else's eyes.

Thanks,

Margaret & Henry



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Financial Gift Ideas for Any Age

Dec. 1, 2023



Helping a loved one pay off debt or paying for a bucket-list vacation for older relatives are...

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2023 Year-End Financial Checklist

Dec. 4, 2023



Year-end financial planning is imperative to preparing for the New Year. Here are ten strategies...

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Don't Put Your Eggs in One Basket. That Investing Principle Still Holds.

Dec. 4, 2023



The storm over the so-called 60/40 investment portfolio misses the point, this columnist says....

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Giving Is Good—For Others, But Also For You

Dec. 4, 2023



You've heard of Giving Tuesday (complete with its own hashtag #GivingTuesday), and it's perfectly...

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6 Questions New Donors Should Ask Themselves About Charitable Giving

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Among other things, take advantage of matching-donation opportunities and give directly to...

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You can't force holiday cheer—but 3 habits can help you feel happier this season

Dec. 4, 2023



Do you ever feel like the holiday season comes with an unwritten script you struggle to follow?...

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