



Sucré-Vail

Wealth Advisors[®]

Achieving Financial Wellness without Unnecessary Risk

A Little Less Money Drama, Please

Have you noticed: Our lives are constantly bombarded with drama. Whether it makes headlines like the collapse of First Republic Bank earlier this week or is portrayed in TV dramas like the ultra-high net worth thriller "Succession," these stories grab our attention and can potentially throw us into a world of worry or what-if.

But keep all the drama where it belongs – out of your finances.

The truth is, few theatrics (if any) are needed in the consistent work of paying down debt, saving for future goals, and protecting the ones you love. It's really all about building upon good habits that help you make calm, rational decisions with your money.

Speaking of which, here are smart money moves to make in May: Use this month to figure out your debt load. Do you have any activities or big-ticket events coming in the summer months (i.e. vacations, graduations, or weddings)? Plan accordingly by reviewing and adjusting your budget.

As always, I'm here to help and answer any questions you may have about how the news of the day affects you. And the articles below can help keep the drama to a minimum as well. Enjoy!

Thanks,

Margaret & Henry



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May 1, 2023



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