

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



Margaret R Sucré-Vail, AIF® AWMA®

Advisor

Sucré-Vail Wealth Advisors

Office: 888-286-9991
margaret@sucrevailwa.com
www.sucrevailwa.com/



Schedule a Meeting



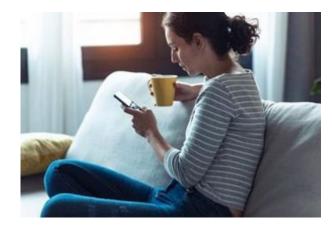
How to Make Difficult Conversations Worse, as Seen on 'Succession'

April 28, 2023



Difficult conversations are a part of life, yet many people don't know how to have them.
Whether...

Read more \rightarrow



Chase Just Bought Your Bank: What First Republic Bank Customers Need to Know

May 1, 2023



What the deal means for deposits, interest rates and FDIC protection.

Read more →



Worried About a Recession? Patient Investors Can Ride It Out.

May 1, 2023



Economic downturns are rough on stocks, but history shows that handsome returns can pile up...

Read more →



What 'Succession' Tells Us About Money Dynamics in Relationships

May 1, 2023



Tom Wambsgans says the unsayable when it comes to wealth and relationships, revealing a...

Read more →



Reasons to be cheerful about the global economy

April 28, 2023



The global economic landscape in 2023 right now is pleasantly surprising. That is something to...

Read more →



The Most Affordable Places To Visit In Every Part Of The World, According To A New Report

April 28, 2023



A new report lists the cheapest places to visit in every region of the world (and the results...

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.