



October 2023 Newsletter

Sometimes when the world seems chaotic, it can feel like the only thing that makes sense with our finances is spending as little money as possible. But is that the right approach for right now?

When it comes to your overall wellness, it's not just about pinching pennies. True success encompasses achieving a well-balanced and fulfilling life. And though saving and investing are primarily designed to help you pursue long-term goals, it's equally important to consider your emotional goals along the way.

Life is meant to be LIVED, after all.

So, if you're considering a change that may not make financial sense right now – whether it be retirement or other type of leave, a dream vacation, or undertaking a home renovation – consider it an aspiration that may be worth it in the grand scheme of things. Remember, not every decision needs to revolve solely around numbers and spreadsheets. Working together, we can better understand your aspirations, habits, and tendencies, so you can identify moments when taking a risk could be beneficial – in more ways than money.

Here are some articles I founds interesting. Please enjoy them and let me know if you have any questions or thoughts.

Thank you,

Peter



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Barron's Daily: The U.S. Economy Is a Juggernaut. Why It May Not Remain That Way.

Oct. 27, 2023

B A briefing on what you need to know for markets in the days ahead, including exclusive commentary...

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How to Play the Market When Threats Abound

Oct. 19, 2023

B The stock and options markets are eerily calm as world leaders try to avert a ground war in the...

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Oct. 3, 2023

B Unless Congress takes action, the lifetime estate and gift tax exemption will decrease...

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Positivity is Provocative — 3 Ways to Embrace Optimism in a Negative World

Oct. 17, 2023

E How practicing gratitude, releasing negative people from your life and allowing yourself to dream...

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How This Year's Hottest Investment Could End Up Costing You

Oct. 31, 2023



Money-market funds are seeing record interest, but advisers say cash is no substitute for stocks...

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Social Security Benefits Will Rise 3.2% In 2024, While Top Tax Jumps 5.2%

Oct. 12, 2023



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