



Your Quarterly Retirement Plan Newsletter

Happy New Year! As we reflect on 2023, it's clear that many predictions missed the mark. Despite inflation and interest rate challenges, those who weathered the storm by sticking to their financial strategies deserve a congratulations. Whether you adjusted your financial goals, resisted FOMO, or maintained your strategic course, kudos to you! Navigating the financial landscape with discipline is no easy feat.

In the realm of finance, 2023 taught us a valuable lesson: ignoring the short term noise and staying focused on long-term goals pays off. This brings me to the importance of our financial well-being. By reflecting on the past year, we can solidify our game plan for the upcoming one. As your plan's financial advisor, I'm here to support your journey toward financial success, whatever 2024 may bring.

Let's kick off the year by connecting and discussing your financial aspirations. Share your thoughts and concerns, and let's ensure your strategy aligns with your goals. In the meantime, check out the articles below for insights into the financial world. Knowledge is power, and together, we'll strive to make 2024 another successful chapter in your financial story.

Thank you,

Peter



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Investors' Hope for 2024: A Return to Long-Lost Normalcy

Jan. 2, 2024

WSJ

Many think markets can find a more stable equilibrium after recent rate increases.

[Read more →](#)



Your 401(k) Is Up. Don't Let It Go to Your Head.

Dec. 19, 2023

WSJ

There are pitfalls to checking your balance too much—even in good times.

[Read more →](#)



How to Set Financial Goals for Your Future

Dec. 14, 2023



Steps to take to be financially secure—now, and into retirement

[Read more →](#)



9 Financial Mistakes to Avoid in 2024

Jan. 2, 2024

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I know you've been told everything you should do, but what about everything you shouldn't?

[Read more →](#)



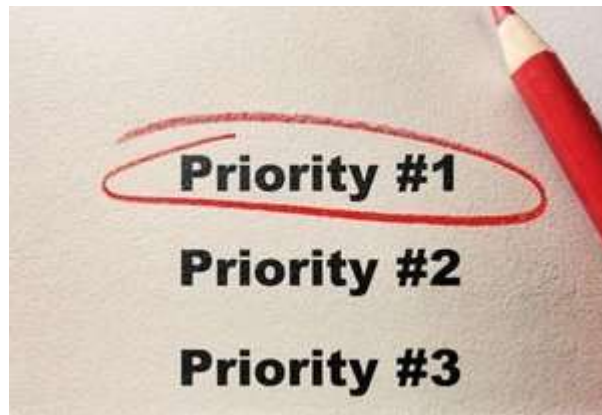
5 Money Personality Types: Which One Are You?

Dec. 15, 2023



Like almost everything else in life, your response to money is dictated by your personality. But...

[Read more →](#)



The Surprising Power Of A Singular Priority In Money And Life

Jan. 8, 2024

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One of the biggest problems we have with managing priorities is that we have too many of them!

[Read more →](#)

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