



Sucré-Vail

Wealth Advisors[®]

Achieving Financial Wellness without Unnecessary Risk

We could use “a talk”

Talking is one of the first things babies learn how to do - most within the first year of life. So it stands to reason that the older we get, the better we would be at communicating, right?

Sadly, that’s not always the case. Getting older doesn’t make communication any easier, especially to people near and dear to us, and even more so about sensitive topics like aging or finances. But the Barron’s article below gives great suggestions on how to facilitate these sometimes difficult conversations, no matter which side you’re on. And like our parents say, it’s for our own good!

Setting aside purposeful time to discuss issues like long-term care and future planning can help to ensure another year doesn’t go by without a little more peace of mind and better communication.

If you need more accountability or ideas on how to get started, let’s talk about it.

Also included are some additional articles about important financial topics you’ll want to consider in these times as well. I’d love to know what you think. Feel free to share with your loved ones to keep the conversation going.

Thanks,

Margaret & Henry



Margaret R Sucré-Vail, AIF® AWMA®
Advisor

Sucré-Vail Wealth Advisors

Office : [888-286-9991](tel:888-286-9991)

margaret@sucrevailwa.com

www.sucrevailwa.com/



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Sept. 20, 2021

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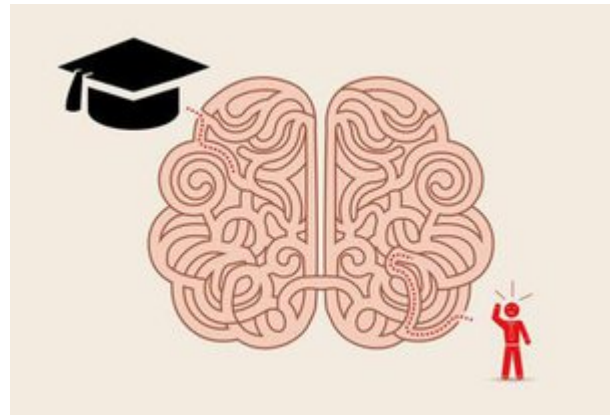


Tax Strategies You Don't Want to Miss Before the End of the Year

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