



Sucré-Vail

Wealth Advisors[®]

Achieving Financial Wellness without Unnecessary Risk

Your Money and Your Life in a Wild New World

Living in these uncertain times may fill you with frequent questions about the state of your finances and wellness — seemingly by the minute depending on the news of the day. Thankfully this week, calm has settled over financial markets after the banking industry's recent volatility. Is this a positive sign for the coming months, or could there be something deeper happening?

That's why I'm passing along these articles this week that can help answer some of the pressing questions you may be pondering, such as:

- What's all this I hear about a recession?
- Should I just be putting my cash under a mattress right now?
- How can I get the maximum protection for my loved ones at the most affordable price?

Asking questions about financial matters is crucial for making informed decisions and achieving your financial goals. Financial literacy is a skill that everyone should strive to develop — and what better time to focus on financial literacy than April, which is financial literacy month in America.

So please, enjoy the articles, and let's build your financial acumen. What are you curious about? I'd love to discuss any questions you have about opportunities for you in this wild new world.

Thanks,

Margaret & Henry



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What to Do With Your Money—and Your Life—in a Wild New World

April 6, 2023

B From buying real estate to getting a new credit card, answers to perplexing questions in a time...

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What You Need To Know To Make Your Tax Filing Go Smoothly

April 3, 2023

F When it comes to dealing with the IRS, keep in mind the Boy Scout motto: "Be Prepared." These are...

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Here to Help: How to Manage Money Stress Ahead of Tax Day

April 6, 2023

T With tax day looming, here are some expert tips for managing the stress.

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Stop Telling Everyone What You Do for a Living

April 10, 2023

WSJ Handle the 'What do you do?' question with aplomb, and make more space for the rest of your life

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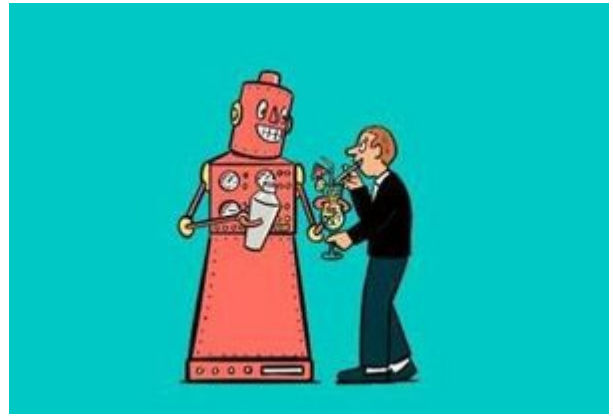


If You're Risk Averse, What Could You Be Missing?

April 5, 2023

F Reaching your potential often requires some stretching. Here's some solid advice on risk-taking.

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His week with ChatGPT: can it make him a healthier, happier, more productive person?

April 6, 2023



I've never had an assistant, a life coach or a personal trainer – perhaps AI is just what I'm...

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