



Sucré-Vail

Wealth Advisors[®]

Achieving Financial Wellness without Unnecessary Risk

Let's clear the air, financially speaking

Spring is a time for renewal, growth and fresh air. It's also a great time to clean out your closets, clear out the cobwebs, and get rid of the old junk cluttering up our lives.

As long as we're at it, what about a spring cleaning for your finances?

It's not just about getting rid of the clutter; this week as we see inflation subsiding and risk of a recession fading, you have an opportunity to take a breath, assess what you have, make sure it's working efficiently and decide if anything needs replacing or updating.

Some of the necessary groundwork has already been laid during tax season, so let's take advantage of the timing by dusting off old plans and reevaluating with fresh eyes. I can also give ideas on how to utilize your refund, including considering the past-present-future 30-40-30 approach discussed in the New York Times article below.

Let's check out your options. These articles can serve as inspiration and motivation as well. Enjoy!

Thanks,

Margaret & Henry



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Ways to Spring Clean Your Finances

April 18, 2023

F With tax season in the rear view mirror, it's a great time to give your finances a once-over

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What to Do With Your Tax Refund? Save for Emergencies.

April 17, 2023



The average refund is down from last year, but still almost \$3,000. One option experts recommend...

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Is a Maid Worth the Money or Should I Clean Myself?

April 17, 2023

I Hiring a maid or a house cleaning service may seem like the ultimate luxury for many of us. But...

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9 Unexpectedly Powerful Insights From Doing Our Taxes

April 18, 2023



Going through our expenses and income for the year to do our taxes can show us so much to help us...

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A Two-Minute Burnout Checkup

April 14, 2023



Ongoing stressors we face at work and home count toward our total level of chronic stress. And...

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People Are Investing in Bonds Again—Once They Figure Them Out

April 14, 2023



After years of low returns, they're paying real money again. But as investors are discovering,...

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