



Sucre-Vail

Wealth Advisors[®]

Achieving Financial Wellness without Unnecessary Risk

School's back in session

Just like that, it's back-to-school season. Tell me, where did the summer go?

As kids of all ages go back to class, with all of the apprehension and excitement that may bring in these turbulent times, it's also a great reminder that in life, summer ends but the learning never does. We are always presented with challenges and opportunities to expand our knowledge and grow.

It appears, though, that Americans are slipping in that regard. According to the survey in the Forbes article below, the U.S. is experiencing a steep decline in financial literacy in recent years - especially when dealing with more complex topics like inflation, financial risk, and mortgage rates.

How is your financial IQ? Are there some topics you could use some brushing up on?

The easiest way to fix any gap in knowledge is to ask a question. I can be a great resource for you, and we can discuss how your strategy is positioned to face these complex times. The articles below give insight as well. Feel free to share them - and keep the financial literacy conversation going to ensure your circle has the same potential for wealth and wellness.

Thanks,

Margaret & Henry



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Will That College Degree Pay Off?

Aug. 16, 2021



A new report measures the “return on investment” offered by various higher education programs.

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Preparing for Your First Day Back at the Office

Aug. 12, 2021



After the mass exodus from the land of cubicles in 2020, millions are returning to offices in 2021.

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America Is Not Great When It Comes To Money. Here's A Two-Pronged Approach To Fix That

Aug. 17, 2021

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Top 10 Most Common Financial Mistakes

Aug. 14, 2021



Here we'll take a look at some of the most common financial mistakes that often lead people to...

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Aug. 16, 2021



During lockdown, many families felt closer than ever. They don't have to lose the good stuff.

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Aug. 16, 2021



Watching the payoff of so much training in the Olympics can be a motivator for our own...

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