



Sucré-Vail

Wealth Advisors[®]

Achieving Financial Wellness without Unnecessary Risk

At The Top of Your List

As we celebrate the holidays, I want to wish you and your loved ones a joyous and peaceful time. Now is when we often reflect on what truly matters in our lives, and I hope that your financial wellness and overall happiness are at or very near the top of your list.

Your mindset – and taking steps each day toward your goals – is closely tied to your sense of gladness and well-being. So, whether you're celebrating with family and friends or simply enjoying some quiet time, take a moment to appreciate all the reasons in this season that bring you joy and fulfillment. I count you among mine. Thank you.

And to help you stay informed and inspired this week, take a moment to enjoy these articles curated for you from the financial news. Looking forward to when we can connect in the new year!

Warmest wishes for a happy and healthy holiday.

Thanks,

Margaret & Henry



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Ho, Ho, Holy Stress! Maintaining Mental Wellness During The Holidays

Dec. 18, 2023

F Remedies to achieve peace and joy amid what some call the most stressful season of the year.

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

Dec. 19, 2023



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

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Key Financial Figures You Need To Know For 2024

Dec. 14, 2023

F What financial changes do you need to know for 2024 to stay prepared for your retirement?

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What Fed Rate Cuts Mean For Your Money, Mortgages and More

Dec. 18, 2023



With inflation cooling, investors are betting that rates will drop in 2024.

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You've Got Too Much Stuff. 3 Smart Ways to Declutter Your Home by 2024.

Dec. 13, 2023



Worried about new stuff filling up your home this holiday? Here, organizational experts share...

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Just say no: 13 ways to get out of everything – from extra work to Christmas parties

Dec. 13, 2023



Do you yearn to set strong boundaries, but are scuppered by a lifelong tendency to people-please?...

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