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May's Financial Roundup Is Here!!

Hi, Valued Client

Our monthly newsletter offers market updates, access to our most recent blogs, a financial outlook for upcoming month, and a lifestyle section...all delivered straight to your inbox!

Market Research Update -
What Happens After A Bear Market Starts?

"Life is like riding a bicycle. To keep your balance, you must keep moving." – Albert Einstein

The S&P 500 Index was down more than 20% on an intraday basis on Friday, but managed a huge rally late to avoid closing down 20% and moving into an official bear market. With the S&P 500 down 18.7% though (as of Friday's close) a bear market is still quite possible.

Here are four things to know should stocks go into a bear market.

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Our Monthly Outlook -
Dawn of a New Era for Bonds

Core bond investors have experienced the worst start to the year ever. However tough this year has been so far though (and it has been tough), the potential for future returns has improved meaningfully, in our view. Starting yields tend to be a good predictor of future returns and have become more attractive in a number of markets recently. With yields on most fixed income markets moving sharply higher, now could be a good time to revisit fixed income markets.

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Recent Blogs

With the onset of higher taxes, taxpayers in the upper brackets may want to reposition their portfolios. Even those in lower tax brackets may benefit from portfolio review and reallocation of funds.
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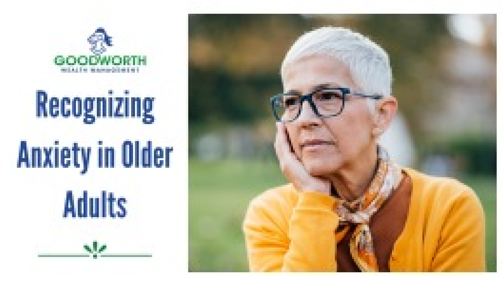

While anxiety is common in both younger and older adults, what may differ is how anxiety presents in older individuals. Consequently, prescription medications for physical ailments may mask anxiety, making symptoms sometimes difficult for you to recognize in your loved one.
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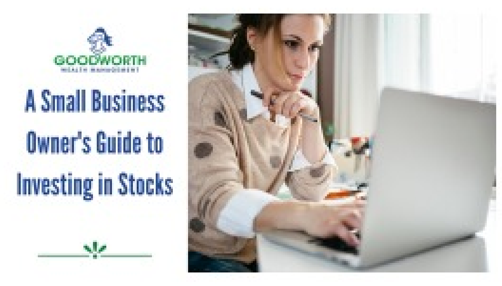

If you own a business and want to diversify your assets by investing in stocks, today's online brokerages make trading fairly easy. However, stock investing is risky, especially in a volatile market. Here are four key considerations small-business owners should make before investing.
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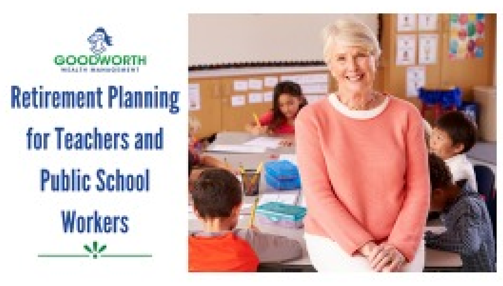

The ability to enjoy a secure retirement is an objective that many teachers and their colleagues pursue years before they leave their jobs. Many public school workers, in different positions, devote their lives to furthering the education of young people. Eventually, each must consider life beyond his or her career and the benefits offered through, and outside of, the public school retirement system.
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