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ANDREWS LUCIA
WEALTH MANAGEMENT LLC

This month, we're focusing on steps you can take before 2024 to lower your potential tax liability and maximize your charitable gifting. In our upcoming Buckingham Connects webinar we will share our perspectives on market performance, review the latest financial planning developments and discuss the outlook for next year. Check out the save the date below.

Remember, as you continue on your financial path, we are here to answer questions and guide you along the way.

Small Steps to Take Before 2024 That May Help Save Big

While taxes may be the last thing on your mind during the holiday season, small steps you take now may result in big savings on your 2023 tax bill.

Read more >

4 Charitable Giving Strategies to Maximize Your Impact

With the year coming to an end, now is an excellent time to revisit your philanthropic plan and review the tools you want to employ in 2024.

Read more >

Video Feature: Buckingham Perspective: *“Is the 60/40 Portfolio Dead?”*

Chief Investment Officer Kevin Grogan covers the current state of the 60/40 portfolio, reviews historical and forward-looking returns, and concludes the 60/40 portfolio is not dead, though some investors might want to consider a modest allocation to alternatives to diversify their portfolio.

Watch now >