



January 2024

Happy New Year!

This month we're sharing some resources to kick off your 2024 planning and tax prep. We also look ahead at the key questions for markets over the coming year and potential implications for your portfolio.



ANDREWS LUCIA
WEALTH MANAGEMENT LLC

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



2024 Planning Considerations and Strategies for Individual Taxpayers

Prepare for the upcoming tax season by reviewing 2024 inflation adjustments, important deadlines and opportunities to minimize your tax bill.

[Read more >](#)



The New Year Brings Big Questions for Markets

With uncertainty surrounding future monetary policy and a looming presidential election, Investment Strategy Manager Alex Kluesner looks at the biggest questions ahead and the implications for your portfolio.

[Read more >](#)



Video Feature: Buckingham Perspective: *"Is it a Good Time to Invest in Commodities?"*

While investors may be familiar with direct ownership of commodities like gold and other precious metals, investing in them through financial markets offers a wider range of diversification for your portfolio.

[Watch now >](#)