



March 2024

This month we're talking the "personal" in "personal finance". We discuss how you can align your financial plan with your values and life changes – including welcoming a new family member!

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



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How Your Advisor Can Build a Plan Based on Your Values

Your values—or what matters most to you—drive every decision you make in life. So, what does that mean for your financial plan?

[Read more](#)



5 Financial Planning Tips for Welcoming a Baby



When planning for the arrival of your new bundle of joy, don't forget to babyproof your finances.

[Read more >](#)

What to Do When the Market Hits All-Time Highs

Chief Investment Officer Kevin Grogan offers some valuable considerations when making changes to your portfolio during market highs.

[Watch now](#)





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