



March 2023

The month of March signals spring is near, a chance for warmer weather as well as new beginnings. Spring provides the nudge for planning and projects. We're planning some spring cleaning and spring break trips with the kids. It is also the dawn of tax season, and we want to help you navigate!



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U.S. vs. International Equity Allocation

What is the correct U.S. versus international equity allocation for a portfolio? In this edition of Buckingham Weekly Perspectives, Chief Investment Officer Kevin Grogan shares the principles for determining the correct equity allocation split, the cyclical nature of these investments, current valuations and the long-term forecast.



[Watch now](#)

Funding a College Education with Taxes in Mind



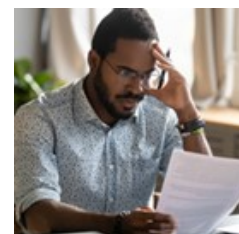
While 529 plans are a popular way to save for college education expenses, Buckingham Senior Tax Manager Shawn Williamson shares more options that may benefit both students and parents from a tax standpoint.

[Read more >](#)

Avoiding Fraud, Theft and Overcharges

Misdirected checks, unauthorized credit card usage and fake invoices are among several risks that small business owners should be aware of when reviewing their finances.

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