



August 2023

We've reached the dog days of summer! Parents are ready for kids to get back to school, recent college graduates are settling in at new jobs. Speaking of graduates, you might have someone in your life going through this transition and needing some guidance on managing money for the first time. It's important to have this conversation with children and grandchildren just beginning their financial journey.



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

Demystifying the Income Tax Reporting System

Once tax filing season is over, it's not uncommon for taxpayers to receive an inquiry letter for more information about their returns. But have you ever wondered why? Knowing how the tax reporting system works can help you make smart financial planning decisions all year round.



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6 Key Financial Considerations for Unmarried Couples



Marriage may not be part of the plan for every couple. These strategies can help unmarried couples avoid conflict while working toward their financial goals together.

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The Economic Outlook for Q3 2023

What is on the economic horizon for the next few months? Buckingham's Chief Investment Officer Kevin Grogan shares a new Quarterly Outlook feature, providing insight on the latest macroeconomic topics including inflation and key economic indicators.

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