



July 2023

Summer is in full swing, and we hope you are enjoying some time to relax, recharge and reconnect. This time of year can be a wonderful opportunity to seek new perspectives on life and determine new directions.

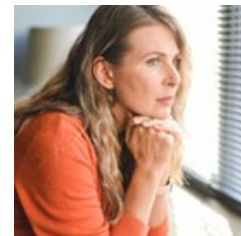


ANDREWS LUCIA
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As you continue on your financial journey, we are here to answer questions and guide you along the path. As always, feel free to reach out to your advisory team with any questions.

The Financial and Emotional Impact of Sudden Wealth

Whether it's from an inheritance, settlement, divorce, a major sale, initial public offering (IPO) of your business or winning the lottery, most people would agree coming into a large sum of money is a good problem to have. We have all dreamed about having the resources to instantly pay off our mortgage, purchase a new vehicle or go on a luxury vacation. But sudden wealth comes with a unique set of unexpected financial and emotional challenges.



[Read more >](#)

Navigating Alternative Investment Strategies



Wondering if alternative investments are right for your portfolio? Although we remain skeptical of most alternative strategies, we've found a few that may benefit a well-constructed portfolio.

[Read more >](#)

Investing in High-Yield Fixed Income

Head of Investment Research Jared Kizer takes a deep dive into high-yield corporate bonds and shares three reasons why we do not typically recommend these investments.

[Watch Now](#)



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