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This month dispel the top myths about budgeting that often get in the way of savings goals. We also talk through hiring a professional to manage your trust.



As always, know that as you continue on your financial path, we are here to guide you.



## 5 Budgeting Myths that Prevent People from Saving

Budgeting is key to reaching your financial goals, but these myths might be getting in the way. Director of Family Budget Services Rob Bertman shares tips on creating an effective budget and how to stick to it.

[Read more >](#)



## Should You Hire a Professional to Manage Your Trust?

If a trust is part of your overall estate plan, hiring a professional can offer valuable benefits. Find out how your advisor can help navigate your trustee options.

[Read more >](#)



## Video Feature: How AI Could Change the Economy

Chief Investment Officer Kevin Grogan highlights the opportunities and challenges of AI technology, as well as the investment implications.

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