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This month we cover the evolving landscape of estate taxes and strategies you can begin implementing now to benefit the people and causes most important to you. We also provide our latest outlook for markets and the economy and share a few simple questions that can help investors make sense of the stock market.



ANDREWS LUCIA  
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As always, know that as you continue on your financial path, we are here to guide you. We encourage you to reach out to your advisory team with any questions.



## 5 Ways to Plan for Estate Tax Law Changes

The Tax Cuts and Jobs Act estate tax exemptions amounts are set to sunset at the end of 2025. Wealth Advisor Amanda Otto explores tax-saving options and strategies you can take before the new rules go into effect.

[Read more >](#)



## Video Feature: The Economic Outlook for Q3 2024

Chief Investment Officer Kevin Grogan shares our outlook for markets and the economy. With inflation easing and the labor market cooling, the market is expecting two or three rate cuts before the end of the year. However, it's unlikely that we'll see rates drop to near zero anytime soon.

[Read more >](#)



## Selecting Individual Stocks? 4 Questions to Consider

Picking stocks that will outperform the broader market has been an ambition of investors for years. But is that truly the best strategy? Although these four questions are simple, answering them can be challenging.

[Watch now >](#)