



October 2024

This month, we share a thoughtful, step-by-step guide on aligning your charitable giving with your personal values, so you can approach it with intention before the holiday season rolls around. As Election Day nears, we also want to offer a gentle reminder that market fluctuations during this time are normal. While it can be easy to feel unsettled, try to keep your long-term investment goals in mind and avoid letting political emotions steer your financial decisions. We're here to support you.



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

How to Align Your Charitable Giving with Your Values



Deciding whom to give to, when and how much is challenging until you align your giving plan with your values. Here are some steps you can take to prepare your intentions this giving season.

[Read more >](#)

Staying the Course During a Presidential Election Year

In this episode, Chief Investment Officer Kevin Grogan shares investing considerations to keep in mind as the 2024 presidential election approaches.

[Watch now >](#)



What to Know About the New RMD Regulations

Starting Jan. 1, 2025, new regulations related to required minimum distributions (RMDs) will introduce some big changes for those who own retirement accounts and are required to take withdrawals. As you prepare for the coming year, this article outlines the key



updates to consider.

Read more >

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