



**FULLCIRCLE**  
FINANCIAL

## Still working at 100?

Hello Rebecca,

Did you know that mutual funds, one of many financial tools for diverse and accessible investing, have reached their 100th year? This impressive milestone embodies the essence behind creating wealth-building strategies designed to endure across generations—literally.

Yet, with recent technological advancements happening at such a rapid pace (take AI and automation, for example), it's reasonable to question if the tools we've traditionally used for saving and financial wellness will have the same lasting power into the next century.

Understanding how to navigate these financial questions amid constant changes of life can not only help you feel secure about the future; it's in an effort to build a personalized strategy that's solid yet flexible enough to positively impact you, your loved ones, and the causes you care about today and for decades to come.

Learn more from these articles curated for you this week. Let's continue to chart this journey together, fortifying your financial wellness through the next 100 years – and longer.



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*Thoughtful Wealth Management Starts with a Conversation*

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## The mutual fund at 100: is it becoming obsolete?

March 27, 2024

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April 1, 2024

**FP**

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April 1, 2024

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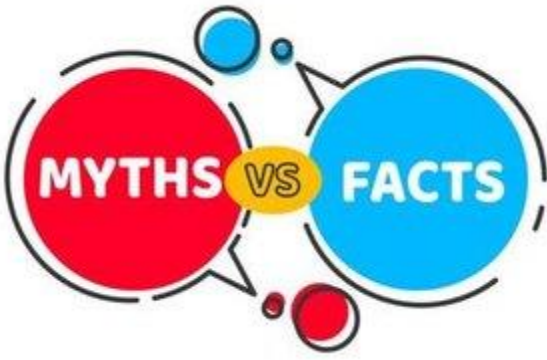
## The S&P 500 Is Poised for Best Start to Year Since 2019

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