



**FULLCIRCLE**  
FINANCIAL

## **Cheers to a Financially Resilient 2023 – Let's Plan for 2024!**

Hello Rebecca,

Happy New Year! As we bid farewell to 2023, it's clear that predictions missed the mark. Despite inflation and interest rate challenges, those who weathered the storm by sticking to their investment strategies deserve hearty congratulations. Whether you adjusted your asset allocation, resisted FOMO, or maintained your strategic course, kudos to you! Navigating the financial landscape with discipline is no easy feat.

In the realm of finance, 2023 taught us a valuable lesson: staying focused on long-term goals pays off. This brings me to the importance of our financial well-being. By reflecting on the past year, we can solidify our game plan for the upcoming one. As your financial advisor, I'm here to support your journey toward financial success, whatever 2024 may bring.

Let's kick off the year by connecting and discussing your financial aspirations. Share your thoughts and concerns, and let's ensure your strategy aligns with your goals. In the meantime, check out the articles below for insights into the financial world. Knowledge is power, and together, we'll make 2024 another successful chapter in your financial story.



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*Thoughtful Wealth Management Starts with a Conversation*

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## How I, and Everyone Else, Got 2023 So Wrong

Dec. 29, 2023



To invest wisely in 2024, we have to decide why the economy defied expectations.

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## A New Year's resolution for investors: Focus on the long term

Dec. 29, 2023



Say 'bah humbug' to predicting near-term events and focuses instead on generating long-term...

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Dec. 28, 2023



Setting goals for the upcoming twelve months is much more achievable — and much more fun.

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## Want a financially healthy 2024? Add these six items to your to-do list

Jan. 2, 2024



Lift your wallet or purse, turn your head and cough: It's time for your annual fiscal checkup.

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## New Year's money resolutions you must make — and how financial pros keep on top of goals

Dec. 28, 2023



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