



**FULLCIRCLE**  
FINANCIAL

## **Back to School, Back to Basics in Investing**

Hello Kevin,

As students nationwide are heading back to school, it's the perfect moment for us to get back to the basics of investing. You're never too old to learn, and a periodic refresher could mean the difference between a good and great financial future!

Understanding core investment principles like diversifying your portfolio, and the power of compound interest can arm you with the knowledge to make sound financial decisions. The investment rules you follow set the groundwork for your financial plan, guiding you toward long-term prosperity. As markets shift and life throws curveballs, having a solid foundational understanding allows you to adapt and keep on track with your financial goals. And this is a lifelong process. As noted in the Wall Street Journal article below, with age comes better financial decisions.

Ready to hone your investment acumen? Dive into our curated list of articles below, offering deep insights into basic and advanced investment strategies. If you find them helpful, please consider sharing them with friends and family. After all, financial literacy is a gift best shared.



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*Thoughtful Wealth Management Starts with a  
Conversation*

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## The Exact Age When You Make Your Best Financial Decisions

Aug. 28, 2023



Research has pinpointed the prime years for making smart financial decisions.

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## A back-to-school refresher on RESP withdrawals

Aug. 24, 2023



There are still a couple of weeks to go before school resumes. But with the cost of a...

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## 5 golden rules of investing put under the microscope

Aug. 24, 2023



These basic investment rules should apply to almost everyone.

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## Back to school on a budget: How to manage your kids' expectations and get what you need for less

Aug. 21, 2023



It's unhealthy to pass money stress on to your kids. Avoid statements like "we can't afford it"...

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## How parents can start smart money conversations with their university-bound children

Aug. 25, 2023

**THE  
GLOBE  
AND  
MAIL** 

Research has discovered that kids today are curious and motivated about managing money earlier...

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## How to get the most out of mentoring

Aug. 29, 2023

**The  
Economist**

The joys of corporate confidantes

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