

March 2021

# Month Ahead

This month we invited partners to cover various topics both macro and micro in breadth that we believe will keep you informed in today's hyperactive climate. Members from our team will also be hosting discussions online.

For this month there will be five webinars that will cover diverse topics covering current markets and new ideas to planning on your personal finances.

Please join us each week for the presentations and register online today.

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**J.P.Morgan**  
Asset Management

**Market Update and  
Downside Protection  
Strategy**

[Register >](#)



**Beyond Public - Investing  
into Private Market**

[Register >](#)



**MFS**  
Investment Management

**Does Value Stocks Still  
Makes Sense in Current  
Market**

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**Wellspring Consulting**  
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**10 Tax Strategy Tips**

[Register >](#)

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## 2021 College Planning Essentials

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### Articles of interest:

Kiplinger published a recent article for small-business owners that provided some great insights, [Small-Business Owners Can Be Divided into 2 Camps – Which Are You?](#)

Continue to stay healthy, practice social distancing, wash your hands often, and wear a mask when in public settings.

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For additional inquiries, please email us [HERE](#).

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