

Money Matters

With Edgewater Wealth Management



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Raymond James & Associates, Inc., member New York Stock Exchange/SIPC

From Us To You

May your days be merry and bright,

And may all your Christmas' be white!

Set Intentions Instead of Resolutions

As we welcome the new year, many of us are used to setting resolutions—goals we strive to achieve with determination and often, pressure. But what if this year, we approached things a little differently? Instead of rigid resolutions, let's focus on setting intentions.

Intentions are about cultivating a mindset, embracing progress over perfection, and allowing flexibility as life unfolds. They invite growth and alignment with our values, helping us stay connected to what truly matters, rather than ticking off a to-do list.

Here's to a year of meaningful progress and positive change!

Frank's Desk



On Christmas Break!

Equity markets carried in November by post-election rally

While politics garner headlines, fundamentals drive the market over the long term.

Equity markets experienced a post-election rally with the S&P 500 crossing 6,000 for the first time on November 11 and finishing the month up 5.7%. The S&P 500 and the Dow Jones Industrial Average each saw four all-time highs in November, driven by the market's belief that the incoming administration's economic agenda is pro-growth.

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Articles



Beyond the News

1,000 POINTS GETTING EASIER. The S&P 500 closed above 6,000 for the first time ever on 11/11/24.

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What's Your Financial "Why" for the New Year?

With wealth comes an expansive list of financial opportunities: paying down debt, upgrading homes, maximizing retirement savings, or supporting future generations. The real question isn't what's possible, but what's most important. This is where clarity and intentionality come into play. Financial planning, done properly, helps you make choices in alignment with your values.

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