

THE PROSPER GROUP OF
RAYMOND JAMES
FIRST QUARTER 2025



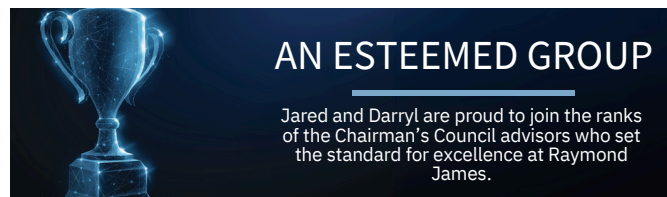
Welcome to Our Quarterly Newsletter!

We are excited to announce the launch of our new quarterly newsletter, designed to keep you informed and engaged with the latest insights and updates. Our goal is to provide you with valuable information that can help you make informed decisions about your financial future. We believe this newsletter will be a great resource for you, and we look forward to your feedback.

Thank you for your continued trust and partnership. If you have any questions or need further assistance, please do not hesitate to reach out.

IN CASE YOU MISSED IT

Honored with Top Industry Awards in 2024 and 2025!



We host quarterly discussions on investment trends using JP Morgan's Guide to the Markets. Highlights from the First Quarter session include:

- Economic resilience in 2024 despite uncertainties.
- Inflation decreased but slowed; labor market stabilized.
- Federal Reserve's ongoing rate cuts with an uncertain 2025 outlook.
- Stocks rose over 20% due to earnings and AI; bonds rebounded.
- Investment opportunities emphasize diversification amid high valuations.

Click [HERE](#) for a full summary.

Stay tuned to sign up for the Second Quarter session when dates are announced!

Market Insights
1Q25 Guide to the Markets lunch / webcast

As we head into the New Year, where does Financial Planning fit into your New Year Resolutions? Contact us to get started!
[#NewYearsResolutions](#) [#FinancialPlanning](#)

Can Financial Planning Really Be Life-Changing?
social-www.forbes.com

Nothing like ending the week with a [#RedFriday](#) "Tailgate" lunch with the Prosper Group families to prepare to watch our [Kansas City Chiefs](#) take on the [Philadelphia Eagles](#)! Let's go Chiefs! [#RedKingdom](#) [#ChiefsKingdom](#)



UPCOMING EVENTS



Minimize Risk & Recycle
at our 2025 Shred Day!

SHRED
DAY



Tuesday, May 6th, 2025

11551 Ash Street, Suite 250 Leawood, KS 66211

9:30 AM - 1:30 PM

Exciting news! The Prosper Group is currently updating our website to include a dedicated events page. We have several client events planned for 2025, and we can't wait to share the details with you.

While our website is still under construction, please keep an eye out for updates and more information on these events.

Stay tuned!



WHAT WE'RE TALKING ABOUT

Tax Season is Upon Us!

Blog Post: Tax Planning Strategies for 2025

As we step into 2025, it's essential to start thinking ahead about your tax planning strategies. Proper tax planning can help you minimize your tax liability and maximize your savings. Here are some key strategies to consider for the year ahead...(read more)

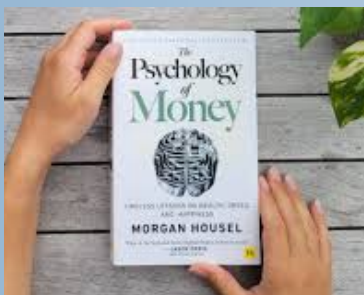


We want to ensure that your tax preparation goes as smoothly as possible. Visit Raymond James' Tax Reporting Resources for important information, resources, mailing dates and deadlines that affect you this tax season!

Did You Know? You can access your tax documents online, once they're produced, by just logging into client access.



WHAT WE'RE READING



"The Psychology of Money" by Morgan House

In our ongoing effort to provide you with valuable insights and resources, I'm excited to share my thoughts on a book that has recently captured my attention: "The Psychology of Money" by Morgan Housel. This book offers a unique perspective on how our behaviors and emotions shape our financial decisions, providing practical wisdom that can help us all make better choices with our money.

It explores how emotions, behavior, and life experiences shape our financial decisions. Rather than focusing on technical strategies, the book highlights timeless lessons about the human side of money, emphasizing the importance of patience, humility, flexibility, and understanding what truly drives wealth, happiness, and security.

"I believe it's a must-read for anyone interested in improving their financial mindset."- Jared Stricklin, CFA®.

STAY UP TO DATE



FOLLOW US ON SOCIAL MEDIA

We are excited to connect with you beyond our regular meetings and updates. Our social media pages are a great way to stay informed about the latest financial tips, market insights, and company news.



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PROSPERGROUPKC.COM

Check out our website for the latest market insights, financial planning tips, and educational resources. Stay connected and informed with our articles, videos, and interactive tools.



INSPIRATIONAL INSIGHTS

“Money’s greatest intrinsic value—and this can’t be overstated—is its ability to give you control over your time.”

— Morgan Housel, *The Psychology of Money*



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THE 2025 FORBES RANKING OF AMERICA’S BEST-IN-STATE WEALTH MANAGEMENT TEAMS, DEVELOPED BY SHOOK RESEARCH, IS BASED ON AN ALGORITHM OF QUALITATIVE CRITERIA, MOSTLY GAINED THROUGH TELEPHONE AND IN-PERSON DUE DILIGENCE INTERVIEWS, AND QUANTITATIVE DATA. THIS RANKING IS BASED UPON THE PERIOD FROM 3/31/2023 TO 3/31/2024 AND WAS RELEASED ON 01/09/2025. ADVISOR TEAMS THAT ARE CONSIDERED MUST HAVE ONE ADVISOR WITH A MINIMUM OF SEVEN YEARS OF EXPERIENCE, HAVE BEEN IN EXISTENCE AS A TEAM FOR AT LEAST ONE YEAR, HAVE AT LEAST 5 TEAM MEMBERS, AND HAVE BEEN NOMINATED BY THEIR FIRM. THE ALGORITHM WEIGHTS FACTORS LIKE REVENUE TRENDS, ASSETS UNDER MANAGEMENT, COMPLIANCE RECORDS, INDUSTRY EXPERIENCE AND THOSE THAT ENCOMPASS BEST PRACTICES IN THEIR PRACTICES AND APPROACH TO WORKING WITH CLIENTS. PORTFOLIO PERFORMANCE IS NOT A CRITERIA DUE TO VARYING CLIENT OBJECTIVES AND LACK OF AUDITED DATA. OUT OF APPROXIMATELY 11,674 TEAM NOMINATIONS, 5,331 ADVISOR TEAMS RECEIVED THE AWARD BASED ON THRESHOLDS. THIS RANKING IS NOT INDICATIVE OF AN ADVISOR’S FUTURE PERFORMANCE, IS NOT AN ENDORSEMENT, AND MAY NOT BE REPRESENTATIVE OF INDIVIDUAL CLIENTS’ EXPERIENCE. NEITHER RAYMOND JAMES NOR ANY OF ITS FINANCIAL ADVISORS OR RIA FIRMS PAY A FEE IN EXCHANGE FOR THIS AWARD/RATING. COMPENSATION PROVIDED FOR USING THE RATING. RAYMOND JAMES IS NOT AFFILIATED WITH FORBES OR SHOOK RESEARCH, LLC. PLEASE SEE [HTTPS://WWW.FORBES.COM/LISTS/WEALTH-MANAGEMENT-TEAMS-BEST-IN-STATE](https://www.forbes.com/lists/wealth-management-teams-best-in-state) FOR MORE INFO.

CHAIRMAN’S COUNCIL MEMBERSHIP IS BASED ON PRIOR FISCAL YEAR PRODUCTION. REQUALIFICATION IS REQUIRED ANNUALLY. THE RANKING MAY NOT BE REPRESENTATIVE OF ANY ONE CLIENT’S EXPERIENCE, IS NOT AN ENDORSEMENT, AND IS NOT INDICATIVE OF AN ADVISOR’S FUTURE PERFORMANCE. NO FEE IS PAID IN EXCHANGE FOR THIS AWARD/RATING.