

Connections | June 2024

Managing your personal wealth isn't just about the dollars and cents. It's about connecting with what matters to you. Across all generations from life changes through life stages, Mesirow is here to help. That's why every quarter we write content on topics that we hope are relevant and insightful for you.

Apples to apples

Investors are often tracking the performance of their portfolios relative to the performance of "the market" often mentioned in the media. While relative performance is a good way to gauge whether the allocation in a portfolio is performing as expected, comparing an individual's portfolio against the major indices may be an apples-to-oranges comparison.

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How to strategize tax diversification

Within personal finance, diversification is most often understood as the practice of spreading investments across various asset classes in order to mitigate overall portfolio risk. However, there is another important form of diversification that often gets overlooked. Strategically allocating assets across accounts with varying tax treatments can help optimize tax efficiency, reduce risk, provide tax flexibility, and potentially maximize after-tax returns.

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Five key financial ideas for young families

Financial planning is a crucial aspect of family life. From managing day-to-day expenses to preparing for major life events, families must navigate a complex landscape of financial decisions. It is easy for the demands of daily life to take precedence — from coordinating schedules for extracurricular activities, to planning birthday parties, or even simply planning a weeknight dinner. This article addresses five key financial planning topics that should be prioritized when trying to accomplish financial goals on top of day-to-day demands.

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Wedding planning: Critical financial tips

It's a fact; couples in the U.S. are marrying later in life, especially college educated professionals. As a result, both partners have often begun to save, invest, and accumulate assets. Premarital financial planning has therefore become extremely important.

And, the awkward question must be asked: "How can we protect our assets when entering into marriage without tainting the romance of engagement?"

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Tools you can use

Mesirow Mondays – Listen In

On the first Monday of every month, Mesirow thought leaders are featured on the WGN Radio 720 "Your Money Matters" show hosted by Jon Hansen. Listen to recent broadcasts about retirement and tax-advantaged strategies.

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Legacy planning guide

Do you and your family have an estate plan? If so, have you considered every angle? If you don't have a plan or want to ensure all your "I's" are dotted and every "t" crossed, our new guide "Blaze your trail: Ensure your legacy" can help you get started.

[DOWNLOAD](#)

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