

WEALTH PLANNING

that leads with your life

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2024

Pathways to Prosperity

Crafting a Roadmap for Lasting Wealth

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FA'ASAU
WEALTH MGMT OF
RAYMOND JAMES

Hello friends,

December is here, bringing time with family, the joy of holiday traditions, and - my personal favorite - the start of ski season! This year is extra special as we'll be introducing our three-year-old, Hannah, to her first ski lessons. Watching her take on this new adventure has me thinking about how this time of year brings both familiar and fresh opportunities.

Lately, I've had meaningful conversations with many of you about year-end tax planning - those smart, sometimes small steps that can make a big difference as we close out the year. With the markets shifting and new financial decisions on the horizon, it's a great time to tie up any loose ends and start the new year feeling secure, prepared, and ready for what's next.

As always, please feel free to reach out for any help you need as you wrap up your own year-end planning. Wishing you and yours a wonderful holiday season filled with peace, joy, and warm memories.

Warm Regards,

Rebekah

Spotlight

Welcome our newest teammate: Ming!

I'm excited to introduce the newest member of our team, Ming Cai! Ming joins us as our Practice Marketing

Associate, where he'll be focusing on bringing more educational content to our social media, planning client events, and much more. He'll also be stepping in as a backup for Ali to assist with client administrative needs. Ming can't wait to meet each of you and looks forward to getting to know our client family!



I'm excited to share that I was recently featured in *The Culture*, Raymond James' magazine, where I had the opportunity to tell the story of how I got into this profession and the journey that brought me to Raymond James.

The article reflects on the experiences that shaped my approach to client relationships and the values I bring to each interaction. It's an honor to have been featured and I hope you'll check it out yourself!



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729 S Bridgeway PI
Eagle, ID 83616

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