

WEALTH PLANNING

that leads with your life

FEB
2025

Pathways to Prosperity

Crafting a Roadmap for Lasting Wealth

Volume 1, Issue 6



February is here, and while it may be the shortest month, it's one of the busiest as we gear up for tax season. In our home, we're settling back into routines after the holidays, and getting ready for my annual trip to visit clients in Texas later this month. I can't wait to see folks in-person and spend time catching up.

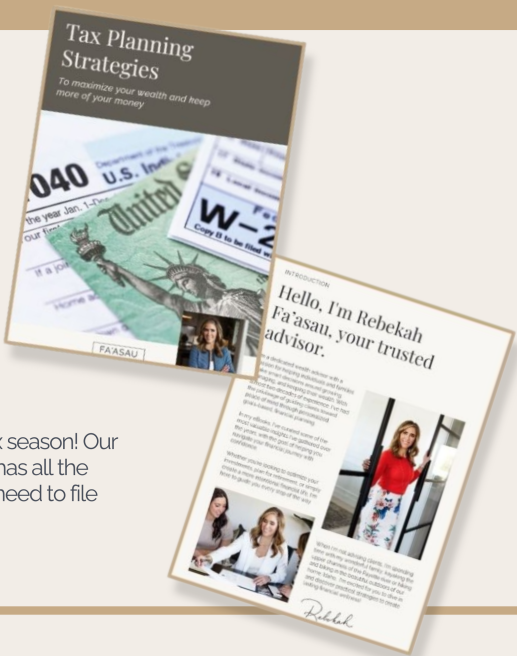
Lately, I've had some wonderful conversations with clients about tax-efficient withdrawal strategies - think Roth conversions, strategic charitable giving, and maximizing retirement contributions. These small steps now can lead to meaningful benefits down the road, especially as we work to keep more of what you've earned.

Our team is ready to support you as you prepare to file your taxes this year. Be sure to check out the IRS website for tips [here](#), and **don't miss our brand-new Tax Guide eBook**, linked below, packed with strategies to help you plan smartly.

Here's to a productive, intentional month ahead!

Warmly,

Rebekah



Spotlight

Stay prepared this tax season! Our February newsletter has all the tips and insights you need to file with ease. Read now!

[Read eBook](#)

2025 Economic Outlook

As we move through February, the economic landscape presents a mix of opportunities and challenges. The results of the 2024 U.S. Election have cleared up some uncertainties, with a Republican sweep providing a unified government that markets seem to embrace. While this brings stability in some areas, it also opens doors to new policy risks, particularly around inflation and interest rates.

Economic Growth

The U.S. economy remains on solid ground, bolstered by fiscal policies like CHIPS, IRA, and Infrastructure Acts, along with a relatively strong job market. Despite a weakening manufacturing sector, economic growth should continue, provided new policies maintain this favorable environment. However, shifts in government strategy could change this outlook.

Inflation

Inflation has been decelerating, thanks in part to supply chain improvements and the Federal Reserve's high interest rates.

But inflation remains above the Fed's 2% target, with shelter costs staying stubbornly high. The potential for higher inflation from new tariffs and immigration policies adds uncertainty. While we don't expect inflation to surge drastically, these factors may prompt the Fed to maintain or even interest rates longer than expected.

Interest Rates

With the economy's current strength, high interest rates aren't yet a constraint on growth. However, as fiscal stimulus fades, interest rates will likely become a bigger challenge. Additionally, tariffs and new immigration policies could drive inflation up, forcing the Fed to adjust rates to keep inflation in check.

As we look to the rest of 2025, we'll need to stay vigilant as new policy shifts could dramatically impact growth, inflation, and interest rates.

Stay tuned for more insights throughout the year!

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Discover a blend of key financial insights and personal reflections, all thoughtfully crafted to guide you on your wealth journey.

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Discover actionable tax planning strategies that can help you save more and achieve your financial goals.

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Meet the Team: Ali McCormack

Meet Ali - the heart of our client service team at Fa'asau Wealth Management!

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