

WEALTH PLANNING

that leads with your life

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Pathways to Prosperity

Crafting a Roadmap for Lasting Wealth

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FA'ASAU
WEALTH MGMT OF
RAYMOND JAMES

Happy New Year! There's something about January that feels energizing to me. Maybe it's that fresh-start feeling - a brand new year and the perfect time to refocus on what truly matters. We had a wonderful time with family over the holidays. I hope you did too.

Lately, I've had some great conversations with clients about Roth conversion strategies and their powerful impact on long-term financial planning. I'm looking forward to continuing these meaningful discussions throughout 2025.

With a new administration on the horizon, many of you are curious about how the markets might respond. In my market note below, I share key insights on what I'm keeping an eye on this year.

I'm excited to kick off the year with you and continue to sharing this journey as we create content specifically tailored to your needs. If there are any topics you'd like to learn more about, I'd love to hear your thoughts - your input helps ensure our conversations stay relevant and valuable.

Rebekah



Spotlight

A special holiday moment with my kids, Luke and Hannah! As we kick off January, I couldn't resist sharing this cute snapshot from December - a fun memory of their visit with Santa that still makes me smile.

2025 Market Outlook: Opportunities and Resilience

With the election behind us, markets are shifting focus to longer-term economic and financial trends. Let's explore the key themes shaping 2025 and beyond:

U.S. Economic Strength and Growth Potential

The U.S. continues to outperform globally, bolstered by a dynamic labor market and innovative companies. Policies like the CHIPS Act and infrastructure investment programs will deliver tailwinds, as an estimated 75% of their \$1.7 trillion stimulus remains untapped. Meanwhile, the Federal Reserve's anticipated easing cycle aligns with expectations of economic growth at 2.1% in 2025, supporting a "soft landing" scenario.

Equity Markets: Momentum and AI Investments

The shift from tech-heavy leadership to broader sector participation remains intact. Banks, industrials, and consumer discretionary sectors are gaining momentum, indicating a healthy risk-on sentiment.

AI investment continues to drive corporate spending, boosting profitability across industries. This positions equities for sustained growth, with the S&P 500 potentially climbing to new highs. This positions equities for sustained growth, with the S&P 500 potentially climbing to new highs.

Global Trends and Fiscal Confidence

Globally, 76% of central banks have lowered interest rates, creating a favorable environment for growth. Additionally, the U.S. remains the world's largest energy producer, with record oil output likely to stabilize energy costs and curb inflation.

As we enter 2025, resilience and innovation define the U.S. economic landscape, offering promising opportunities despite geopolitical and valuation headwinds. At Fa'sau Wealth Management, we believe long-term investors should remain optimistic about the trajectory of markets and the broader economy.

Monthly blog *financial and market insights*

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



How to Set Financial Goals that Actually Stick: A SMART Approach for the New Year

Discover the power of the SMART approach to setting financial goals. This article breaks down each step to help you create clear, actionable goals that align with your financial aspirations. Start the new year with a solid plan for financial stability and growth!

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Get ready for a strong 2025 with these three essential financial tips for saving, investing, and planning smarter!

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Explore how to raise financially savvy kids - without overindulging them.

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