TWG Wealth Planning
Together We Grow

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Investor Sentiment Tested

Spring is often thought of as an uplifting time, marked by growth and renewed hope as we emerge from the long months of winter and look ahead to the rest of year. Investors saw signs of such renewed hope in recent weeks, especially on the inflation front as several inflation measures showed signs of improvement. We also saw markets stabilize after the surprisingly fast collapse of Silicon Valley Bank. But although it initially appeared that a stable spring would set the markets up for a calm, quiet summer, a flurry of recent activity is testing investor sentiment.

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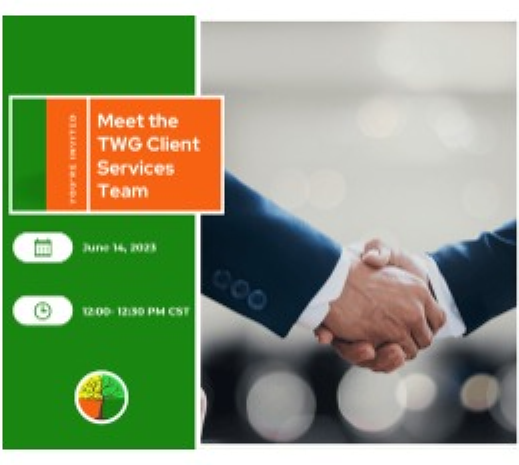
TWG Wealth Planning Upcoming Events - update

Don't forget to register to **Meet the TWG Client Service Team**!



Meet the TWG Client Service Team

When: Wednesday, June 14
at 12:00 PM CST
Where: Zoom
Duration: 30 minutes

Register Here

Curious about 529 plans?

529 plans are designed for saving for education and are beneficial since contributions accumulate and grow tax-free as long as withdrawals are used for qualified education expenses. But 529 plans may also be part of a wealth transfer strategy.

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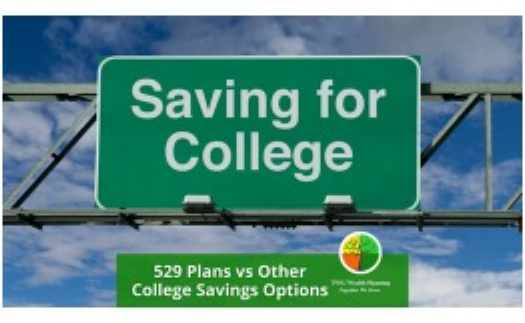
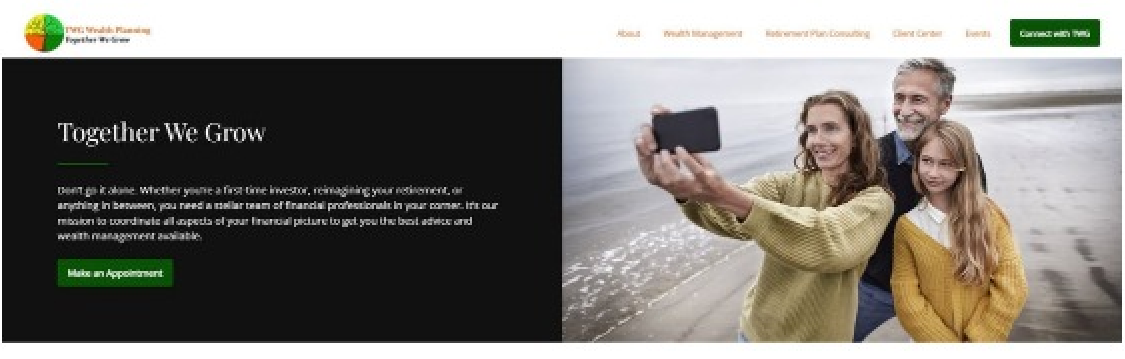


529 plans can be a great way to save for college, but they're not the only way. When you're investing for a major goal like education, it makes sense to be familiar with all of your options.

Read More

We have updated our website!

Check out our new and improved website here.



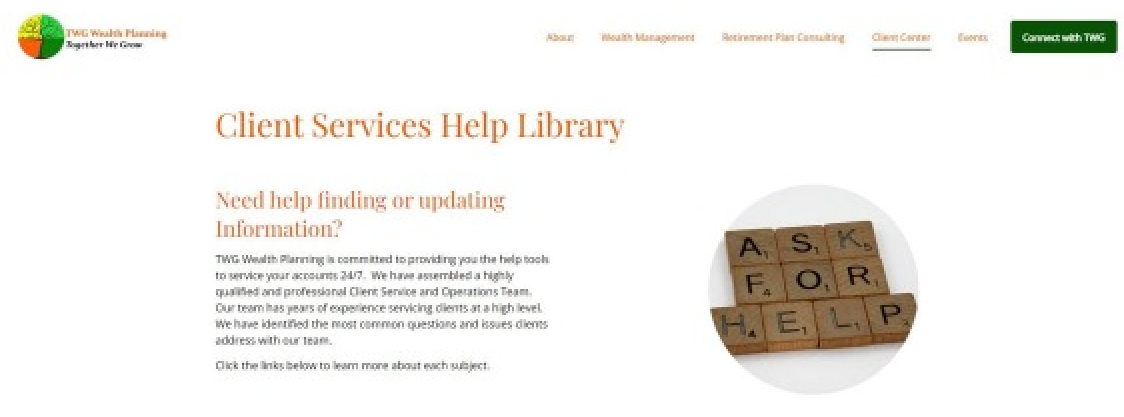
Operations Updates

REMINDER: Has your information changed over the past year?

- Risk Score
- Personal Information (address, phone, email, etc)
- Life Changes

If any of these changes apply to you, please reach out to operations@twgwealthplanning.com to update your information.

ATTENTION! We have updated our website to now include our very own Client Services Help Library. You now have access to most common client requests at your fingertips! Client Services Help Library



What's Cooking with TWG?

For a dish that feels a bit like a dessert, opt for this decadent French toast.

Click Here for Recipe

Have Questions? We Can Help.

Schedule an appointment with a member of our planning team — and talk investments, retirement planning, market news, and more. Book appointment »

Together We Grow.

Contact Us

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