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Solid Start to 2024

Stocks are off to a solid start in 2024. January gains are particularly enjoyable because of the old adage from the *Stock Trader's Almanac*, "As goes January, so goes the year." Nearly 75 years of historical data shows that when the S&P 500 has risen in January, the average gain for the remainder of the year has been about 12%. This January, the S&P 500 was up 1.6%.

Stocks have also historically fared well after the broad index has reached a new all-time high, as the S&P 500 did last month for the first time in over two years. The average 12-month gain after a new high, with more than a 12-month wait between those highs, has been nearly 12%, with gains 13 out of 14 times.

[Read More](#)

February Blog Highlights: Taxes



The federal income tax filing deadline isn't until April. However, the start of tax season is here. Here are some tips for navigating the tax filing process to help lessen some of the stress you may feel as Tax Day arrives.

[Learn More](#)



It is crucial for individuals to engage in strategic tax planning with their financial professionals, particularly considering the changes to the standard deduction and tax brackets for the year 2024.

[Learn More](#)

Checking Under the Hood

RETIREMENT PLANNING TIPS

with Kevin Speich
401(k) Specialist



Does your retirement plan make curious noises when it travels over a few market bumps? Are you getting enough mileage out of your savings rate? Is your diversification strategy as energy efficient as it should be? Performing annual maintenance on your 401(k) can help make the road to retirement as smooth as possible. Here's a six-step checkup that can be performed in just a couple hours over a weekend. [READ MORE.](#)

Have more questions?

Please give our office a call to schedule an appointment with a financial advisor.

[Contact Us](#)



QCD Reminder

If you would like to do a Qualified Charitable Donation towards your RMD, please email operations@twgwealthplanning.com with instructions so we can process your request.

Tax Form Reminder

Your LPL tax forms will be mailed out between now and mid-March. Please log into Account View to view your documents. Please note our office will not know the exact date of when a client's forms are mailed out.

Need a Review?

Please schedule your appointment by visiting our website or click [here](#).

Are There Any Changes TWG Should Be Aware Of?

This is a gentle reminder to always keep our Operations Team informed of any important life changes that may impact your financial plan.

For a Change of Marital Status, please contact our office.

We will be requesting a copy of a supporting document that verifies the name change: Examples include:

- Marriage Certificate
- Divorce Decree
- Certificate Court Document

What's Cooking with TWG?



Nothing fills (and warms) the stomach during colder months quite like chili. But instead of traditional chili, try your hand at this white bean chicken chili. It features a hearty mix of chicken, white beans, chilies, garlic, and more!

[Click Here for Recipe](#)

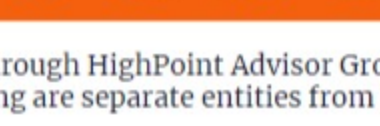


Have Questions? We Can Help.

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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