

MAR
2025

Pathways to Prosperity

Crafting a Roadmap for Lasting Wealth

Volume 1, Issue 7

FA'ASAU
WEALTH MGMT OF
RAYMOND JAMES

March is here, and I know a lot of you are feeling uneasy with all the headlines - **tariffs, market swings**, and everything in between. I've heard your concerns in our recent conversations, and you're not alone. The **uncertainty** can feel overwhelming but remember: we built your financial plan with times like these in mind. Staying the course isn't always easy, but it's how we protect long-term success.

On a brighter note, we have some exciting team news - Ali is expecting a baby! Plus, we're sharing highlights from our recent client appreciation event (be sure to check out the photos). And for business owners, don't miss this month's blog on a smart tax-saving strategy: hiring your kids.

If the news cycle has you worried, let's talk. I'm here to help.

Warmly,

Rebekah



Spotlight Client Event Recap

A wonderful evening at
William Chris Winery in the
beautiful Texas Hill Country!

We had a great time connecting with everyone and I especially enjoyed introducing my husband, James, to so many of our amazing clients for the first time.

Thank you to everyone that attended for making it such a special event!

Forbes Recognition

I'm deeply honored to be named to the 2025 Forbes Best-In-State Top Women Wealth Advisors list!

This recognition wouldn't be possible without my incredible clients who trust me with their financial futures - thank you for allowing me to do what I love every day.



New Team Addition!

Exciting news from our team! Our wonderful Client Service Associate, Ali, is expecting a baby this August! We're absolutely thrilled for her and her growing family.

As she prepares for maternity leave, our Marketing Associate, Ming, has been training to step in and ensure a seamless experience for our clients. We'll share more details as we get closer to her leave, so you feel confident and supported during the transition.

Join us in congratulating Ali!

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.

NEW BLOG POST

**Business Owners:
Stop Overpaying
Taxes by Hiring
Your Kids**

[Read Article](#)



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Monthly *video roundup*

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Trusted IRA

Explore how a Trusted IRA can help safeguard your retirement and legacy.

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Working with Us

Discover what it's like to work with our team - expert guidance, personalized strategies, and peace of mind for your financial future.

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3 Lesser Known Retirement Age Milestones

Life changes fast, and your insurance needs should keep up. From outdated policies to missed opportunities, ignoring your coverage could jeopardize your financial future.

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