

June 2021

Month Ahead

This month we invited partners to cover various topics both macro and micro in breadth that we believe will keep you informed in today's hyperactive climate.

For this month there will be four webinars that will cover diverse topics covering current markets and new ideas to planning on your personal finances.

Our webinars take place every Wednesday at 1:30 PM.

Please join us each week for the presentations and register online today.



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Tax Return Line Item Review

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Capital Insight - Our Outlook on Opportunities

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nuveen

A TIAA Company

Tax-Exempt Municipal Bond Market Update

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How To Coordinate Different Professionals to



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**Manage Your Wealth and
Business**

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For California residents, find more information on COVID-19 vaccination at [My Turn](#).

Continue to stay safe and keep your health as well as the wellbeing of those around you top of mind. For those that are fully vaccinated, still have a mask handy when in large, crowded public settings.

Client Portal

[**Homepage**](#)

Phone: (408) 435-1668

For additional inquiries, please email us[HERE](#).

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