

InVestra April Digest: Insights on Wealth Management and Market Trends

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With a focus on holistic wealth management and a commitment to empowerment through education, InVestra's Wealth Advisors, Erin Eiras, CPFA®, CEPA®, and Stephanie Vokral, CFP®, CDFA®, AIF®, have been helping individuals manage with money for decades. Their goal? To **educate** and **empower** clients and their families by offering insight and information and guide them forward in their journeys towards financial freedom - no matter what their goals may be.

Our newsletters are designed to provide investors with timely, hand-picked information. Simply click "Read more," or click the image thumbnail to view an article in its entirety.



A historic financial shift is underway. Over the coming decades, trillions of dollars are expected to move between generations — a phenomenon widely referred to as the “Great Wealth Transfer.”

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Spring is a season of growth, renewal, and fresh beginnings — a perfect time to reassess your financial goals and strategies. For women investors, building financial confidence isn't just about accumulating wealth; it's about gaining clarity, understanding options, and feeling empowered to make decisions that align with your life priorities.

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Do Midterm Elections Matter for Markets? A Historical Perspective

Historically, U.S. midterm election years tend to be more volatile and show weaker stock market performance through much of the year as investors deal with uncertainty about policy and the political landscape. However, once election results are known and uncertainty fades, markets have often rebounded strongly, with above-average returns in the year following past midterms.

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How One Wealth Manager Cracked the Code on Serving Female Executives through Technology and Specialized Expertise

In a recent *Digital Journal* article, Erin D. Eiras explains how her wealth management firm focuses on serving ultra-high-net-worth female executives by combining specialized expertise with technology to deliver tailored planning.

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Social Highlight: The Deer Chase Sponsorship

The Annual DeerChase, presented by InVestra, and held at the prestigious Deerwood Country Club, providing a unique opportunity for local women's clubs to come together for a day of golf and celebration.

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In an effort to bring as much value to investors as possible, our newsletters include only pertinent information regarding market matters from research analysts. To access InVestra's various content on topics such as lifestyle, retirement, personal finance, financial planning, and many others, please visit our blog.

Articles are published bi-monthly.

In the world of Wealth Management, success is not about the size of your bank account; it's about pursuing your financial aspirations, no matter how big or small they may be.

If you feel you are ready to take the next step in your financial journey, our team of specialists at InVestra is here to help you. Click the 'Book Time with Us' link below to schedule a one-on-one consultation. Let's discuss your aspirations, address your questions, and develop a personalized wealth management strategy just for you.

Your financial future is within reach - don't wait!

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