

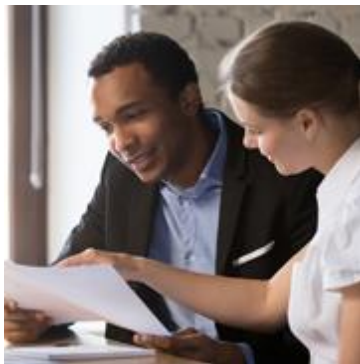


June 2023

Thankfully, the debt ceiling debacle is behind us as an agreement has been reached to raise the debt ceiling for two years, extending it past the 2024 election. Events such as these underscore why we seek to construct portfolios that will hold up well over the long term, regardless of short-term market conditions.

This month we're sharing insights on the benefits of various retirement savings vehicles and their related tax obligations.

As always, feel free to reach out to your advisory team with any questions.



Private Equity and the Fear of Missing Out

Some investors are wondering if private equity would be a good addition to their portfolio. Here's a breakdown of this evolving asset class.

[Read more >](#)



Pre-Tax or Roth? Your 401(k) Options Explained

Although the choice boils down to when you will pay taxes, here are several scenarios to keep in mind when deciding between pre-tax and Roth contributions in your 401(k).

[Read more >](#)



Video Feature: Buckingham Perspective: *“Three Lessons from the Debt Ceiling Crisis”*

The country breathed a collective sigh of relief as Congress recently passed the highly anticipated debt ceiling agreement. Buckingham’s Head of Investment Research Jared Kizer shares evergreen investment lessons we can learn from the averted debt ceiling crisis.

[Watch now >](#)

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