



PEBBLE VALLEY

WEALTH MANAGEMENT

MAKING SENSE OF THE MARKETS - MARCH 2019

Here is the latest issue of the PVWM Newsletter covering the markets and relevant articles to help guide your financial choices. Give me a call or send an email if you have any questions. Enjoy!

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U.S. Fund Return Snapshot: High Yield, Small Growth Rebound Continues

"U.S. diversified stock fund categories are off to their best two-month start to the year in three decades amid signals from central banks that monetary policy tightening is off the table in 2019 and from hopes that trade tensions will begin to ease."

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6 Fast Facts About 529s

"While there are many different options available to help save for a college education, 529 plans continue to be one of the most popular savings vehicles.."

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The Benefits of Financial Advice

"In this article, we examine whether some types of advisors are providing better services to households than others. We concentrate on five decision-making domains: portfolio risk level, savings habits, life insurance coverage, revolving credit card balances, and emergency savings."

And we look at four information sources: financial planners, transactional financial advisors, friends, and the Internet.”

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Dividend Payers in an IRA? Not Always.

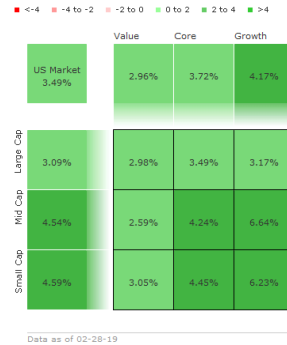
Some experts recommend holding dividend paying stocks in a Traditional IRA rather than a taxable account. The ability to defer paying taxes on a high stream of income of which you have no control on the timing is the main reason cited. As a general statement, I disagree without looking at the investor's tax situation.

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Market Barometer

The Morningstar Market Barometer provides a visualization of the performance of the US equities market broken down by size and style for the past calendar month. For details on other asset class returns see [Kirk's Blog!](#)

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