Advisory Blog

Timely insights on the issues that matter most to advisors and their clients

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The Fed Tries to Get Ahead of the Market

By: *Jim Caron* | *September 21, 2022*

New York - The 75 basis point (bps) rate hike came as expected, but one surprise was the 100 bps markup in end-of-year policy rates to 4.4% from 3.4%.

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Combine a Roth Conversion with a Charitable Giving Strategy

By: *Eileen Tam* | *September 20, 2022*

Boston - One of the most important considerations when selecting between a traditional individual retirement account (IRA) and a Roth IRA is whether an investor's tax rate will be higher or lower in retirement. Clients who believe their income will be higher in the future may want to convert into a Roth IRA — but the conversion should be planned within a holistic investment strategy.

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When MBS Benchmarks Go Low, Active MBS Managers Go High

By: *Andrew Szczurowski, CFA*, *Chip Driscoll, CFA* | *September 19, 2022*

Boston - When we borrow Michelle Obama's famous catchphrase, we aren't talking about politics in the run-up to the midterm elections. What we mean is that active investors may be able to capture attractive opportunities by migrating up in coupon in the agency mortgage-backed securities (MBS) market.

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Fed Signals Possible Slowdown in Rate Hikes as Economy Cools

By: Eric Stein, CFA | July 28, 2022

Boston - As expected, the Federal Open Market Committee (FOMC) raised its fed funds target by 75 basis points (bps) to 2.5% at its meeting on July 27. But the big news came from the commentary of Fed Chair Jerome Powell, which was taken by the market as quite dovish.

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