

Advisory Blog

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

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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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[EV Forward: Mixed Signals in the Market? Consider a Barbell Approach for Bonds](#)

By: *EV Forward* | *August 2, 2022*

New York - Data series in the market are at odds with each other, sending mixed signals to investors depending on whether they consider inflation — a lagging indicator — or sentiment and survey data on economic activity, which are more forward-looking measures.



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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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[Inflation Continues to Boil, with No Simmer in Sight](#)

By: *Andrew Szczurowski, CFA* | July 14, 2022

Boston - The sun is the center of our solar system and the nonfarm payroll report used to be what the bond market and the Federal Reserve revolved around. While we don't have our own James Webb Space Telescope, there is no doubt the monthly Consumer Price Inflation (CPI) report is at the center of the bond and Fed universe now.

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