

## 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

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Charitable Giving | Taxes
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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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Fed | Investment Grade Fixed Income | Rates

When MBS Benchmarks
Go Low, Active MBS
Managers Go High

By: <u>Andrew Szczurowski, CFA</u>, <u>Chip</u>
<u>Driscoll, CFA</u> | 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 mortgagebacked securities (MBS) market.

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