

Advisory Blog

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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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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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