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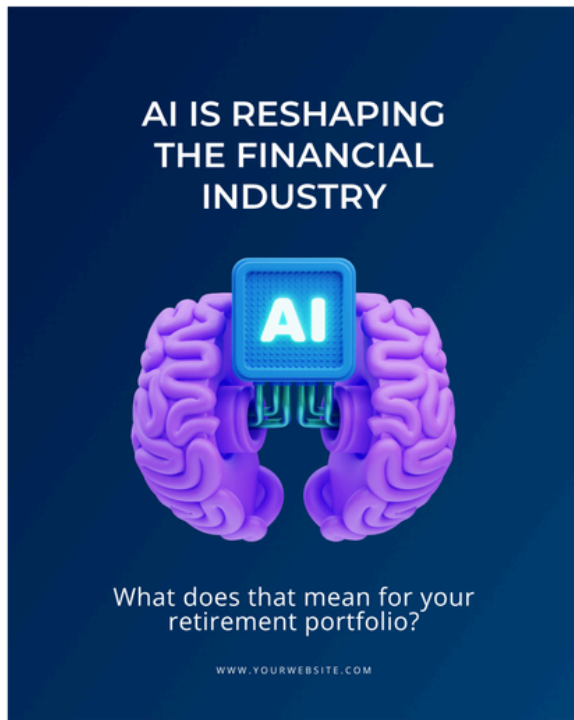


MONTHLY
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CALENDAR

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Date of Posting: 8/04/2025



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Post Title: AI & Finance

Caption: Worried AI might replace your job? You're not alone. But here's a follow-up question: How could it impact your retirement portfolio?

AI could automate up to 30% of work activities by 2030 (McKinsey). That means real shifts in labor markets, dividends, commercial real estate – and potentially, portfolio performance. We're not advocating drastic changes. But we are helping clients think ahead and adapt their strategy with these long-term shifts in mind.

Is your advisor helping you do the same?

#AllImpact #RetirementPlanning #TechnologyTrends

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