Connections | December 2025

Managing your personal wealth isn't just about the dollars and cents. It's about connecting with what matters to you. Across all generations from life changes through life stages, Mesirow is here to help.

This quarter, we've written about how finances can adapt to various life and investment transitions.

Helping the next generation build financial security

Raising financially confident children is one of the greatest gifts we can give as parents and grandparents. Whether your goal is to fund higher education, encourage responsible money habits or provide a head start on retirement savings, there are several proven strategies that can set kids on a path toward lifelong security. Below are some key approaches to consider.

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Seven year-end planning tips

With so much happening in the world today and the usual end-of-year craziness of the holiday season, it's not always easy to remember critical financial deadlines. A well-maintained financial plan is always important, but with so many changes happening, it's more important today than ever. Depending on your unique situation, some tips listed below make sense for you and your family. We hope these helpful tips are an essential reminder that some planning strategies cannot wait until next year.

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Five financial habits that could cost you more than you think

As markets fluctuate and headlines warn of uncertainty, it's easy to let fear drive financial decisions. But often, the real dangers lurk not in the market itself — but in our own habits. Here are five of the most common financial mistakes to avoid, and what you can do instead to stay confident and focused on your goals.

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Key considerations for an early retirement

For most Americans, retirement represents the ultimate goal, the reward after decades of working, saving and investing. Popular culture often paints a familiar picture, mornings on the golf course, afternoons at the beach and visits with family and friends. While many spend much of their adult life working toward this milestone, some individuals find themselves reaching it far earlier than expected. Whether through disciplined saving, a liquidity event like selling a business, receiving an inheritance or another financial windfall, the opportunity to retire early can arrive sooner than imagined, and with it, important decisions to navigate.

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Tools you can use

OBBBA Webinar

Mesirow Wealth Management recently hosted a webinar, “Navigating Tax and Policy Shifts under the One Big Beautiful Bill,” featuring Rebecca Solomon, J.D., LL.M., Mesirow Estate Planning Specialist and Gary Pattengale, CFP®, Mesirow Advanced Planning Specialist. The session explored how the new federal law reshapes tax brackets, deductions, charitable giving and estate planning strategies that may affect your financial plan. Click to watch the webinar using this password **rPN.5Kefy**.

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