QUARTERLY NEWSLETTER

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1852 FINANCIAL GROUP LLC

June 2026

NYL Investment Products FYC Leader of the Year

Earning the NYL Investment Products FYC Leader of the Year award represents a distinguished level of achievement within New York Life, recognizing exceptional performance in delivering investment solutions to clients. This honor reflects not only a strong command of financial products, but also the ability to build meaningful client relationships and guide individuals toward well-structured, goal-oriented strategies. As a top producer in investment product placement, the recipient demonstrates a high level of professionalism, consistency, and commitment to helping clients align their financial decisions with long-term objectives.

Congratulation to our own, Jordon Accetta, on being awarded New York Life's Investment Products FYC Leader of the Year in 2025!

Marketing Highlight

Recent market conditions continue to reflect a mix of resilience and uncertainty. The U.S. economy is still growing at a moderate pace, with GDP around 2% in 2026 (S&P Global, 2026), while inflation remains elevated but is expected to gradually ease over time. At the same time, geopolitical tensions and rising energy prices have added short-term volatility, contributing to inflation pressures and market swings.

In this kind of environment, working with a financial advisor is more important than ever. Markets don't move in straight lines, and headlines can create emotional reactions that may not align with long-term goals. A financial advisor helps you stay disciplined, adjust your strategy when needed, and make informed decisions based on your unique situation—so you're not just reacting to the market, but planning confidently through it.

Congratulations Cathie!

A CERTIFIED FINANCIAL PLANNER® (CFP®) professional is someone who has met rigorous standards in education, experience, and ethics, and is trained to take a comprehensive approach to financial planning. They don't just focus on one area, they look at the full picture, including investments, retirement, insurance, taxes, and estate planning. Working with a CFP® you gain personalized guidance that may help you avoid costly mistakes, and keep your financial plan aligned with your goals over time, which could lead to greater clarity, confidence, and peace of mind about your future.

If saving money is wrong, I don't want to be right.

Spring Cleaning

Spring cleaning isn't just for your home, it's also an ideal time to refresh your financial life. Take the opportunity to review your budget, insurance coverage, and beneficiary designations to ensure everything still aligns with your current goals and future plans.

Start by evaluating your spending habits to eliminate unnecessary expenses and checking your credit report for accuracy. Organizing important documents (like wills and tax records) can also bring clarity and peace of mind. From there, consider rebalancing your investments, increasing retirement contributions, and revisiting your emergency fund to make sure it continues to meet your needs. Even small steps, such as consolidating accounts or updating passwords, can help keep your financial life streamlined and efficient.

Working with a financial advisor can make the process even smoother. Advisors from 1852 Financial Group LLC can help you identify any gaps, prioritize key actions, and ensure your plan stays aligned. This will give you confidence that your financial "spring cleaning" is both thorough and impactful.

1852 In the Wild

Left: Cathie and her daughter at her schools fun run!

Right: Cathie and Katie ran the Greenville Swamp Rabbit Half Marathon in February!

Check out our website **here** to learn more about us and what we can do for you and your future financial needs!