

## **From the Desk of Chris Eckert, September 2024 - Resources and Insights to Navigate Today's Volatile Financial Markets**

Wow, that was a quick 18 months. I joined Wells Fargo Advisors (WFA) in March of 2023 and the time has just flown by. From onboarding clients, to enhancing & updating my [model portfolios](#), to building my new [website](#), it's been a very busy period. Now, I'm excited to relaunch my e-newsletter; it's now called **From the Desk of Chris Eckert**, and this is the first edition. Its *raison d'être* is referenced in the title's tagline, resources and insights to help investors navigate today's volatile financial markets. I do hope you find them timely and informative.

Also, I realize that circumstances change over time and some previous subscribers might not need our updates anymore. If that's the case, please use this [link to unsubscribe](#).

### **Election Day**

Election Day is just weeks away and from the vantage point of many investors, the outcome, along with its implication to the direction of policy and the behavior of the financial markets, remains a chief concern. Please find within the latest thought leadership from across Wells Fargo on the election. Our shared goal is to help our clients prepare for a range of outcomes as well as support them as they think about the election's impact on their lives and livelihoods. As always, please let me know if I can be a resource.

### **Market Commentary**

[Click here](#) for the latest weekly market commentary from Scott Wren, Senior Global Market Strategist at the Wells Fargo Investment Institute (WFII)

Wells Fargo Investment Institute, Inc. is a registered investment adviser and wholly-owned subsidiary of Wells Fargo Bank, N.A., a bank affiliate of Wells Fargo & Company

### **State of the Markets Monthly Roundtable**

Please join Paul Christopher, head of Global Investment Strategy at WFII, as he hosts a roundtable discussion with senior strategists as they cover their latest outlook for the economic recovery, timely equity and fixed income guidance for this stage of the economic cycle, and practical ideas for balancing risk and reward in portfolios.

Replay information:

Dial-in: 980-900-1046

Passcode: 21700

*Replay will be available thought October 12,2024*

### **Insights from the Home Team (WFA)**

- Why own stocks? – Three elements for long term investors to consider. [Read now](#)
- Chart of the week – Positioning fixed-income holdings for rate cuts. [Read now](#)
- 2024 Elections: Insights and Impacts - [Click here](#)
- Investment Strategy – Weekly market insights from the WFII Global Investment Strategy team. [Click here](#)

## Insights from our External Partners

- Estate transfers: To Trust or not to trust – discover five trust alternatives that could save you money (Vanguard). [Read now](#)
- U.S economy poised for a soft landing – what comes next? (Capital Group). [Read now](#)
- How elections move markets in 5 charts (Capital Group). [Read now](#)

## Portfolio Corner

This month we highlight our **Dividend Growth Model Portfolio**, which seeks companies that can provide consistent, annual dividend growth over a long-term investment horizon. Through consistent dividend growth, the goal is to help investors stay ahead of the wealth eroding effects of inflation.

### Key characteristics:

- Attractive yield – generally higher than the S&P 500 at the time of inclusion.
- Healthy dividend growth – generally in excess of 4% annually.
- Strong dividend consistency – generally longer than 10 years.

Although the portfolio is actively managed, it's our intention to hold stocks in the portfolio over a multi-year time frame. Portfolio holdings will generally vary from 30-35 stocks. For more conservative investors, the **Dividend Growth Model Portfolio** is available with allocations of 80/20, 70/30, 60/40 and 50/50, equity to fixed income investments.

Please [click here](#) to access the **Dividend Growth Model Portfolio** with the current equity sector weightings as well as our other custom model portfolios.

## Welcome

I am pleased to formally announce that Mike Pappa has joined the team as our Senior Registered Client Associate. Mike has over 20 years of industry experience and will be providing all aspects of client administrative support. He can be reached at 203.221.5599 and [Michael.pappa@wellsfargoadvisors.com](mailto:Michael.pappa@wellsfargoadvisors.com).

## About Chris Eckert

For over 40 years, I have been helping our clients to prepare for and navigate through life's most important transitions. Whether it's marriage or divorce, changing jobs or retirement, selling a business, or losing a loved one, these moments can present investors with formidable challenges or tremendous opportunities. Yes, life can be unpredictable, but it does not have to be unplanned. If you have questions or concerns about whether you are on the right path, then let's have a conversation. [Click here](#) to get started.

## Subscribe/Unsubscribe

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The kindest compliment you can pay us is to forward this e-newsletter to you friends, family, or colleagues so they can subscribe. Thanks!!

As always, please let me know if you have questions, thoughts, or comments.

All the best

Chris

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