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Post-Election Debrief

Dr. Dave Yeske, Yusuf Abugideiri, and Lauren Stansell

Agenda

- Resilience: Part of Your **Plan**
(Not Just Your Portfolio)
- Performance Review
 - November 2024
 - 2024 Year-to-Date
 - COVID/The Biden Years
 - 2022-23: Inflation Nation
- What's Fueled the S&P500?
- Trump 2.0
 - Potential Policies
 - What Lies Ahead?



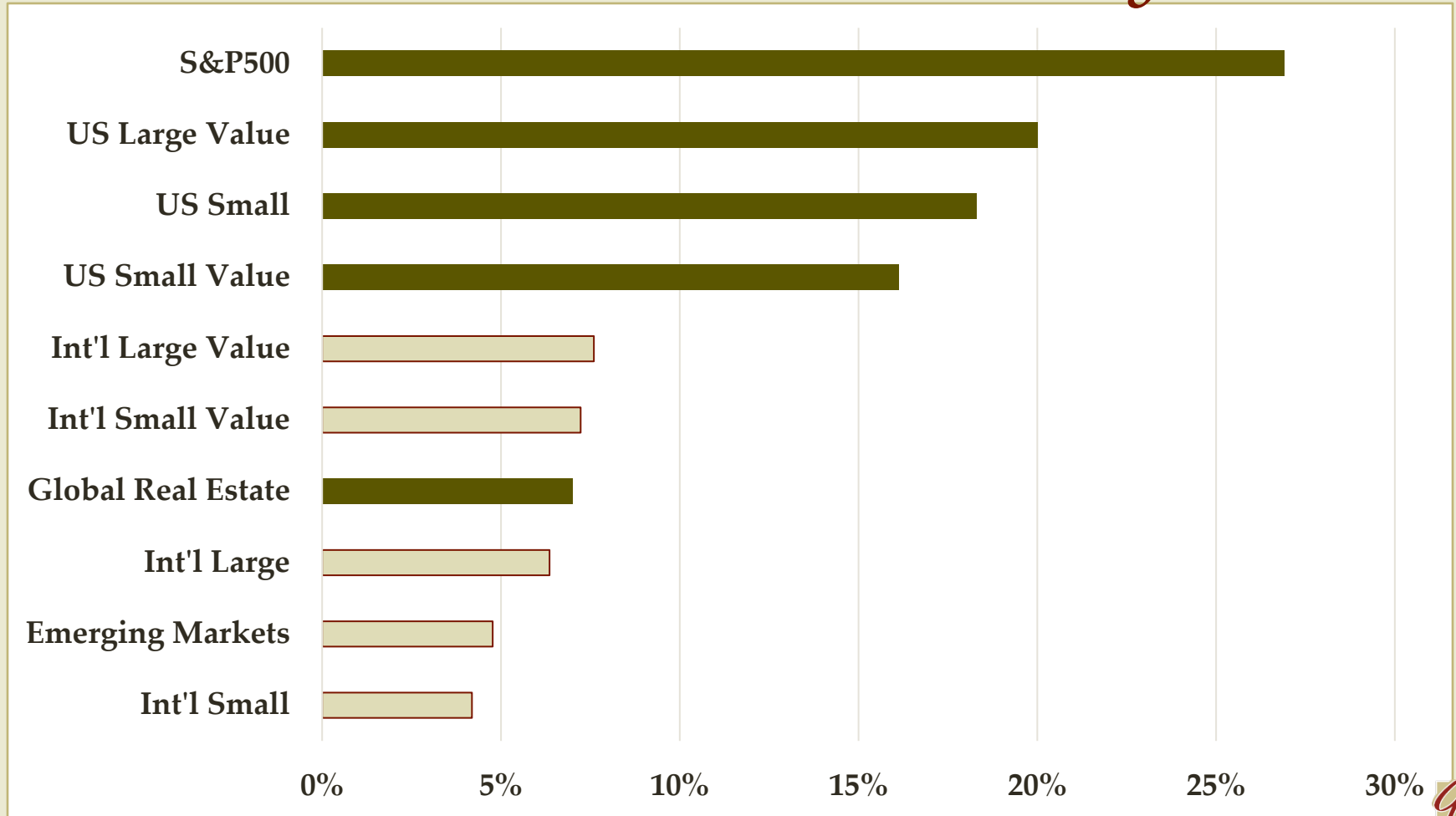
Resilience

Part of Your PLAN, Not Just Your Portfolio

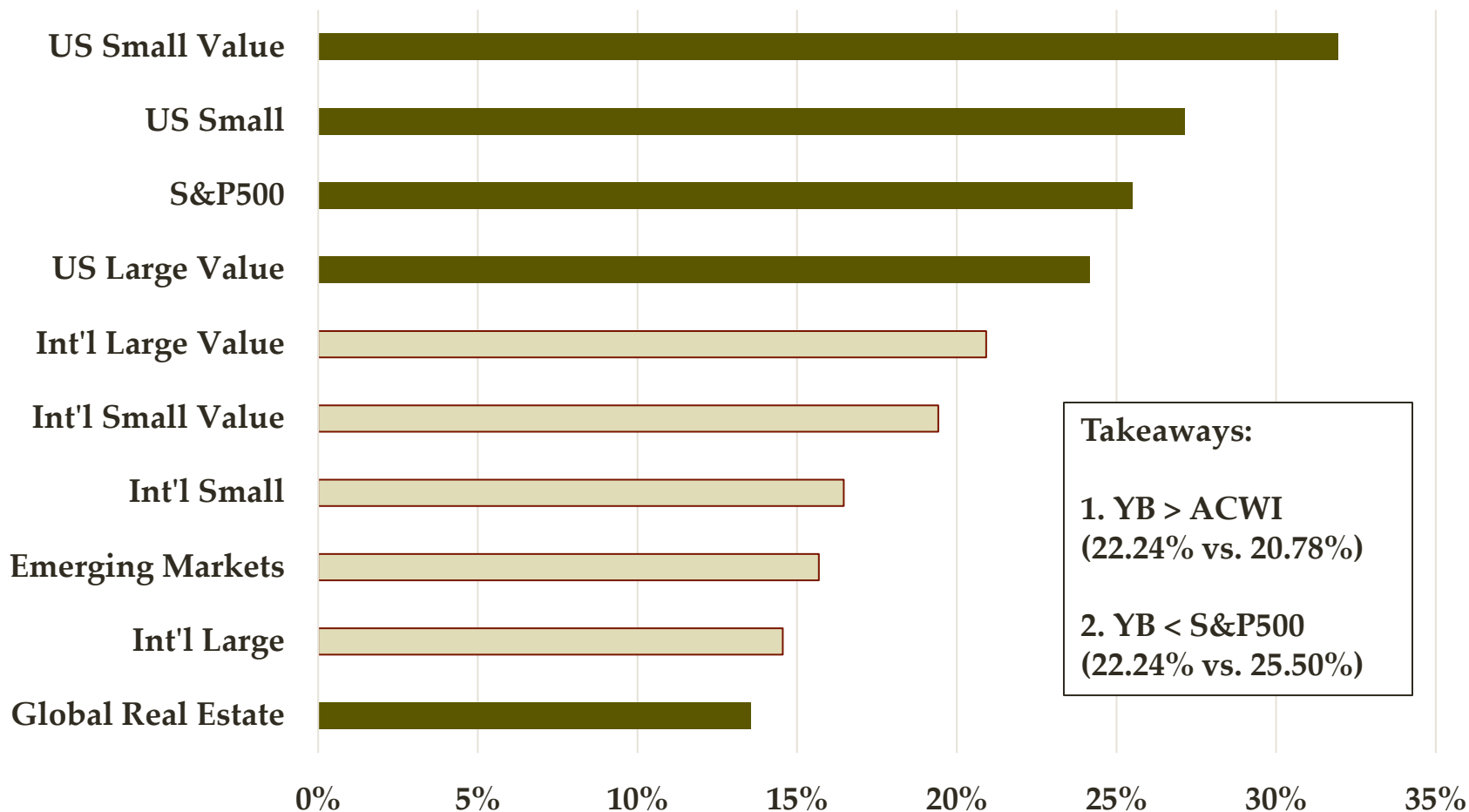
- The market doesn't care who's president...
- ...and neither does your financial plan.
- YOUR sources of resilience include:
 - Controlling what you can control
 - Charitable giving
 - Optimizing financial hygiene
 - College saving and financial literacy for loved ones
 - Your LiveBig life



2024 – Year-to-Date: Recency Bias



2020-24: COVID/The Biden Years



Average Annual Returns: March 23rd, 2020 through November 13th, 2024

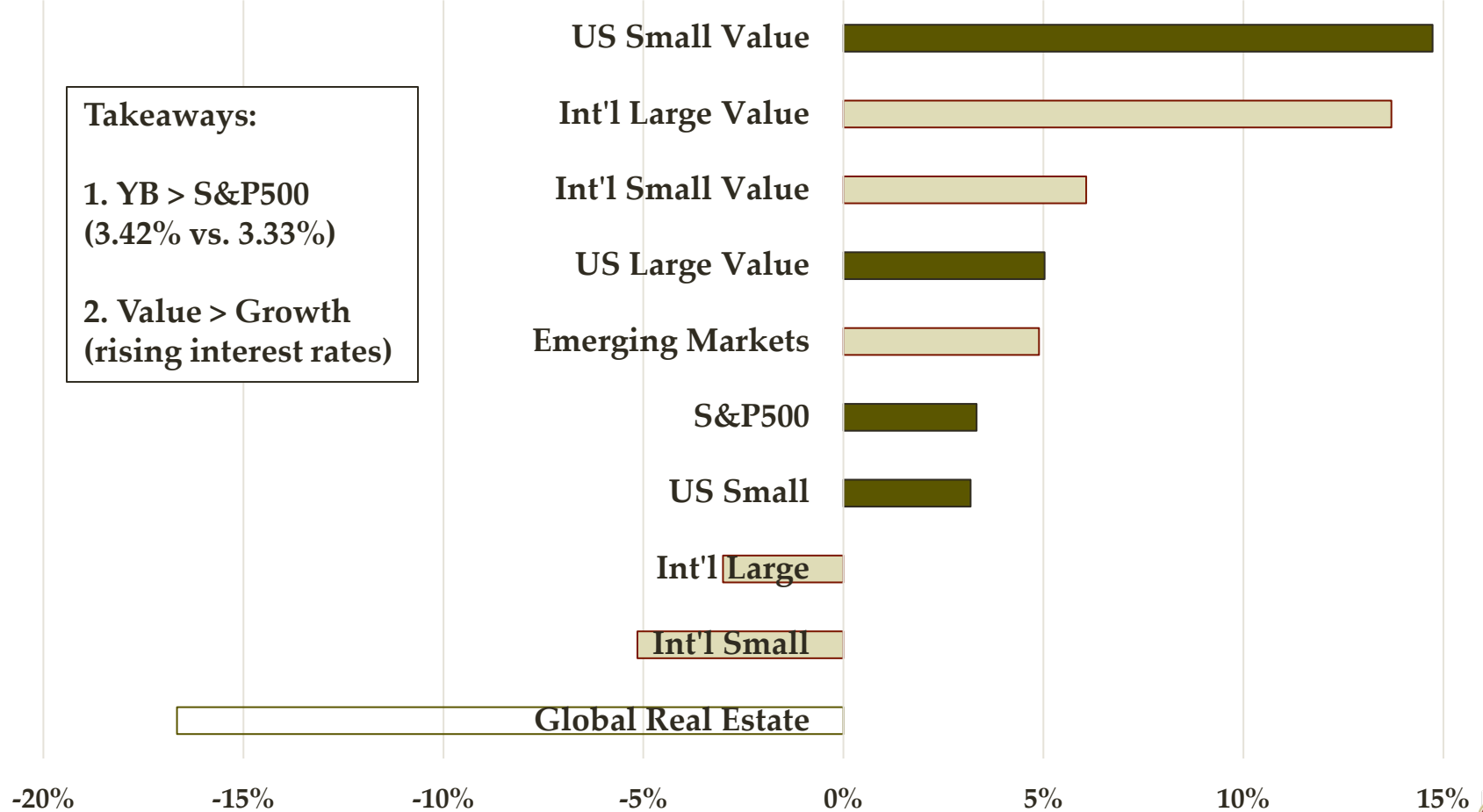


2022-23: Inflation Nation

Takeaways:

1. YB > S&P500
(3.42% vs. 3.33%)

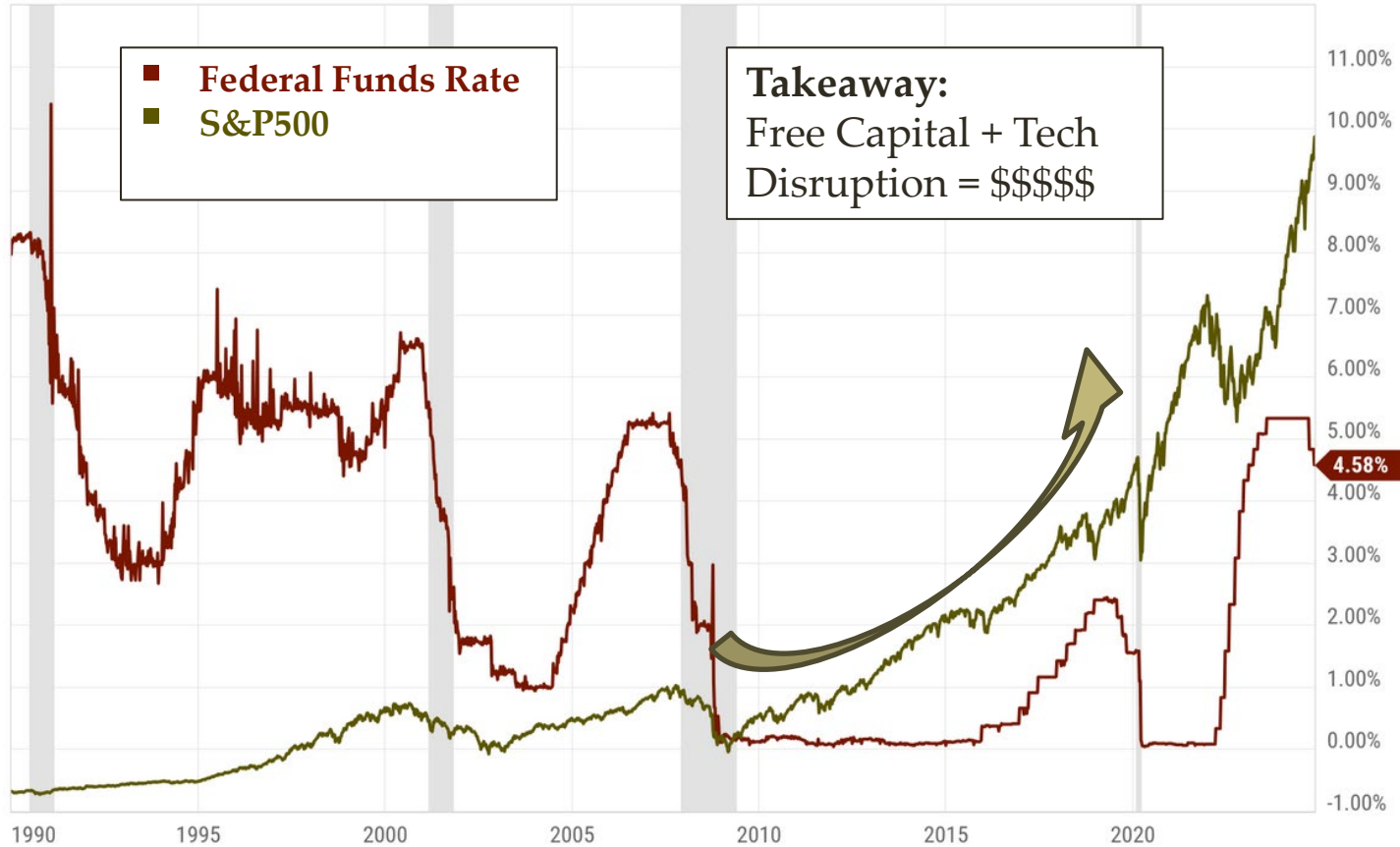
2. Value > Growth
(rising interest rates)



Total Return: January 1st, 2022 through December 31st, 2023



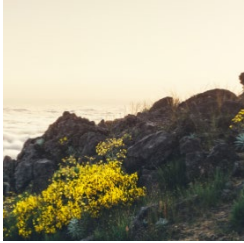
The S&P500's Run: What's The Fuel?



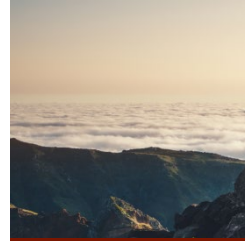
Date Range: 12/29/1989 - 11/13/2024



Trump 2.0: Potential Policies



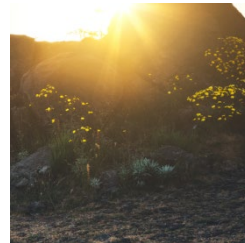
Tariffs?



Trade Wars?



Immigration?



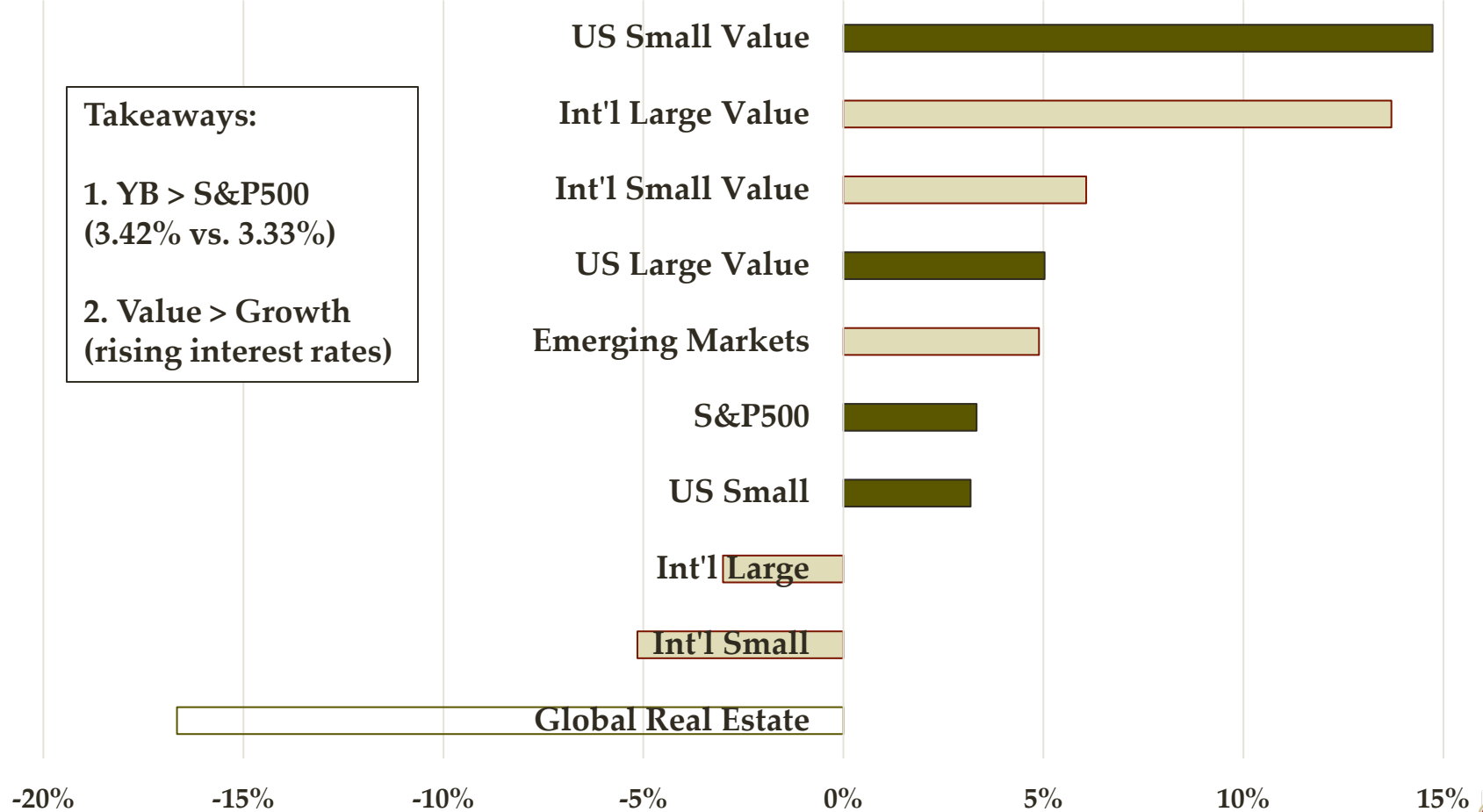
Tax Policy?

Recall Your Portfolio's Resiliency...

Takeaways:

1. YB > S&P500
(3.42% vs. 3.33%)

2. Value > Growth
(rising interest rates)



Total Return: January 1st, 2022 through December 31st, 2023



Trump 2.0: What Lies Ahead?

What We Will NOT Do

- Make reactive changes not based in evidence

What we WILL Do

- Remain vigilant and diligent
- Continue to review portfolios biweekly for rebalancing opportunities
- Continue year-end tax planning reviews
- Monitor tax and estate planning policy proposals and other relevant developments
- Maintain grounded, policy-based approach to decision making
- Remain available for all conversations and updates to your financial plan



Please click here for disclosures related to performance reporting and benchmarks.



Phone: (800) 772.1887 • Email: info@YeBu.com