



**QUARTERLY
NEWSLETTER**
4QTR 2023

MESSICK PEACOCK & ASSOCIATES

At MPA, we believe you should **never stop growing: personally or financially.** We strive to help clients achieve their personal and financial goals. We collaborate with clients to help them identify and resolve obstacles. Our advisors provide a structure and the system to help clients achieve results.

This is the perfect time to determine the areas of growth you are interested in for the new year. Do you want to save more? Learn a new skill? Take steps to become a better leader? Perhaps work with a coach to help you achieve next level success?

As James Clear reminds us: “You do not rise to the level of your goals. You fall to the level of your systems. Your goal is your desired outcome. Your system is the collection of daily habits that will get you there. This year, spend less time focusing on outcomes and more time focusing on the habits that precede the results.”

MPA is here to help you achieve more. Our team of exceptional advisors can provide the support and guidance needed for success. Please reach out to the MPA team anytime with questions or suggestions. We wish you a year of growth and happiness!

All the best, Your MPA Team

Worthwhile Top Stories

Fall 2023

AN OVERLOOKED ESTATE PLANNING TOOL

The benefits of a 529 plan go beyond paying for college expenses – 529s can do more, like transferring generational wealth. Discover how this less well-known advantage can help you move money across multiple generations to secure long-term financial goals for your family and future generations. [p12](#)



INNOVATIONS FOR INDEPENDENCE

Assistive technology (AT) helps foster a sense of empowerment and retain autonomy. Which means living life – independently – and on your terms. From slip-on shoes to motorized makeup applicators, we reveal innovative AT that's keeping people with disabilities and aging adults well-connected and cared for. [p16](#)



RIDING THE WAVES

Sports memorabilia, vintage handbags, fine art. Regardless of what you collect, you should have a plan for your coveted collection's future. Will you pass it down to the next generation or sell it? We run down the benefits, drawbacks and tax implications of each option. [p22](#)



MICHAEL CLINTON

Re-Imagineers



The ROAR Report: Issue # 3



Facts About Middle-Aged Women That Retailers Should Know

Women 50+ are a powerful demographic who are entering a new phase of their lives. They use their newly available disposable income to fulfill personal purchases and they often support companies that align with their values. [READ MORE](#)



What Fashion Companies Do Wrong When Targeting Over-50s

Many older women still care passionately about style and fashion. They remain open-minded, well-connected, and have robust work and social lives. To cater to them, fashion companies are encouraged to maintain their level of design but possibly resize their clothing to respect their customers' changing bodies. [READ MORE](#)



The 50+ Population is Transforming the Fitness Industry

The fitness industry needs to embrace the concept of active aging. Focusing on both younger customers looking to improve their aesthetics and older customers focusing on overall good health, will yield more club memberships. [READ MORE](#)



**Featured in
D-Magazine**

2023 Best Financial Planners & Top Wealth Managers

We are appreciative of our recognition in this year's D Magazine as Best Financial Planners & Top Wealth Managers.



The 2023 Dallas Business Journal Top Wealth Management Firms award is based on local assets under management, 2022. The Dallas Business Journal sent surveys via email to wealth management firms who opted-in and met eligibility requirements. To be considered, the company must be independently-owned and have a location within one of the following counties: Collin, Dallas, Denton, and Tarrant. Out of the 116 eligible firms surveyed, 26 responded. The Dallas Business Journal cannot independently verify information provided by individual companies. In case of ties, companies are listed alphabetically. 116 companies were considered and 25 companies won the award. This ranking is based upon the period from 01.01.2022 to 12.31.2022 and was released 12.01.2023. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither Raymond James nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. Dallas Business Journal is not affiliated with Raymond James.

MPA has been acknowledged by the Dallas Business Journal, securing the 16th position among Wealth Management Firms in the Dallas-Fort Worth Area.





October



November



December



PODCASTS

Raymond James: For What It's Worth

Learn how to plan, invest and live smarter with the Raymond James For What It's Worth podcast. Featuring insights from leading professionals, For What It's Worth brings you the latest in wealth management, market commentary and engaging research.

The Golfers Journal

Join host Tom Coyne as he travels the country interviewing the most interesting people in golf.

The Deep Dive Podcast

Experience the engaging discussion as our CEO, David Peacock, joins Jay Hummel on The Deep Dive podcast.

LET'S STAY CONNECTED

Stay up-to-date with the latest MPA news by following us on LinkedIn.

We value staying connected, so be sure to hit that follow button today to receive regular updates.

NEVER STOP GROWING



Achievement | Competence | Connection | Empathy | Optimism

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