Client Letter – Delgado Family Trust

Date: March 1, 2025

Dear Maria,  
  
As part of our Q1 update, we would like to highlight the following items:  
• Portfolio performance YTD +3.1% vs benchmark +2.6%  
• Tax-loss harvesting confirmed (no wash sales)  
• College 529 contribution schedule under review  
  
Sincerely,  
Your Advisory Team