

# HUDDLE

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The spring season is finally here and we are pleased with the market outlook and economic conditions. Of course, we can't predict with 100% certainty what will happen over the remaining three quarters; but we work to prepare for all possible scenarios to give our clients peace of mind.



In this edition of HUDDLE, we not only provide our [quarterly market review and outlook](#) from Senior Investment Strategist Dave Nolan, but we also highlight the recent [updates to our client portal](#) and share an important blog about how to [safeguard your property ownership from cyber thieves](#). I hope you take the time to read this valuable information.

Lastly, under the heading of [Professional Development News & More](#), we are excited to announce our second consecutive **[Best places to Work Award](#)** from *InvestmentNews*. It's a recognition we are very honored to receive because it means we are doing right by our employees, who we consider to be our most valuable asset.

The McKinley Carter team — located across all six of our regional offices — are dedicated professionals who deeply care about the work we do and the services we provide. Without their care and expertise, we wouldn't be where

we are today. We are committed to providing a corporate culture that celebrates and supports them.

As we look forward to the months ahead working with you to help you achieve your financial goals, we thank you for your continued trust and confidence in us. Our success as a professional partnership and our personal friendship is at the forefront of all we do today and every day.

Sincerely,



[David H. McKinley, CFP®](#)

President and Chief Investment Officer

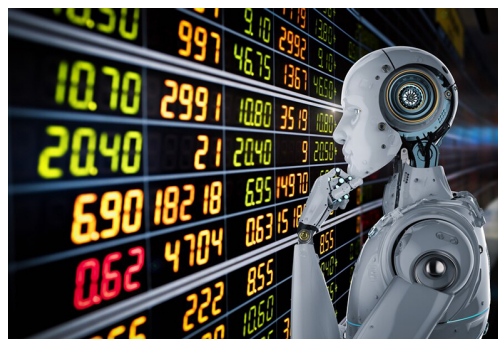
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## INVESTMENT SERVICES

### A.I.: Rise of the Markets

~ by [David P. Nolan](#), Sr. Investment Strategist and Chair of MCWS Investment Strategy Committee

In the *Terminator* movie franchise, the third installment was titled *Terminator 3: Rise of the Machines* and continued the original movie's theme of how the growth of Artificial Intelligence (AI) would ultimately lead to the end of civilization, as AI would discover that it no longer had need of humans. Fortunately, as AI is still in its infancy, the stock market is pricing in only the positive aspects of the technology. While graphic chips provider Nvidia (up 82% in Q1) has served as the poster child for Artificial Intelligence investments, many other technology companies (such as Super Micro Computer – up 255% in Q1) with some connection, or perceived connection, to AI rallied strongly in the first quarter. This led to an overall positive market sentiment throughout the period that lifted the S&P 500 and the NASDAQ 100 higher.



Ultimately, we believe the most powerful trend in AI will be the productivity enhancements experienced by many companies across a wide swath of industries.

[READ \(or watch!\) MORE](#) about our thoughts on market trends and our look ahead to the remainder of 2024 from Senior Investment Strategist Dave Nolan.

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## ADVISORY SERVICES

### Title Protection: Safeguarding Your Property Ownership

Did you know your property ownership is vulnerable to cyber thieves? In this article, we dive into the world of property title protection and explore ways that you can add layers of defense against potential property fraud. Your dream home deserves more than just your investment, it deserves your vigilant protection.



[Read more](#)

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## CLIENT SERVICES

### MCWS Client Investment Portal Updated

~ by [Nick Stebner, CFP®, CPWA®](#), **Financial Strategist and Operations Manager**

Effective April 1, McKinley Carter introduced an updated version of the MCWS client portal. It sports a fresh user interface, provide additional functionality, and later this spring will be followed up with a new mobile app for easier access on your Apple or Android devices. The new portal went live at the [same website URL](#) as the current portal. Your login credentials (email address and current password) have remained the same.

*What's New in the Updated Version?*

Several things! Check out some highlights below or watch our video introduction to the new portal [HERE](#).

- **Basic and Advanced dashboards are available** to show the level of detail you want to see. You can also create your own personalized dashboard with only the information you want to see, arranged just how you like it.
- **Greater customization.** Most widgets on your dashboard will have a “3-dot” menu with additional options for displaying its information. When you click on a widget to drill down further, additional options become available. One exciting new option is custom date periods that allow you to view holdings, performance, and transactions for dates or time periods of your choosing. Also, you can now switch your portal user interface between “light” and “dark” modes for easier viewing.
- **Accounts outside of MCWS management** can now be linked to the portal to show a more complete picture of your net worth, including bank accounts, debts, and real estate.

#### *I Prefer My Current Portal...Can I Keep It?*

Sure. Sometimes we already have everything arranged just the way we like it! You can contact your McKinley Carter advisor and let them know you prefer to keep your current portal version. Please be aware, though, the new client mobile app will only work with the new version of the portal.

#### *New Mobile App on the Way*

Later this spring, we plan to release a McKinley Carter mobile app that will give you access to the new version of the client portal on both Apple and Android devices. Stay tuned for further updates!

The new portal will expand your access to your portfolio. If you do not yet have a McKinley Carter portal set up but would like to check out the new portal, please contact a member of your [advisory team](#).

**PROFESSIONAL DEVELOPMENT NEWS & MORE**





## MCWS Earns Best Places to Work Award

We are very proud to announce that for the second consecutive year we have received the **Best Places to Work Award for Financial Advisors**. *InvestmentNews* magazine has ranked MCWS 6th among 20 medium-sized employers (with 30-49 U.S. employees) who have been awarded this honor. We are the ONLY WV-based firm to receive this recognition! Read more [HERE!](#)



## Estes Earns AIF® Designation

Congratulations to Financial Strategist [Joel A. Estes, CFP®, AIF®, CPFA®, NQPA™](#) for recently earning the Accredited Investment Fiduciary (AIF®) designation.

With 16 years of financial planning experience, Joel serves as a financial strategist in our Dayton, OH office. Joel enjoys building and managing client relationships, providing life planning advice, as well as helping clients reach their financial autonomy goals. He also serves as coordinator of the firm's Retirement Plan Services division, leads our Tax & Legacy Specialized Practice Group, and serves on the firm's Investment Strategy Committee.



## MCWS EXPANDS WEBSITE RESOURCES to INCLUDE 'THE SAVVY'

Did you know you can access MCWS webinars, newsletters, educational videos, and more? That's right, simply click [HERE](#) to visit our website Resources page to see all archived materials and information.

**New this month! We've expanded our Resources page to include information related to [The Savvy](#), our educational initiative just for women! Be sure to check it out.**

And if you're interested in learning what our advisors are saying on a variety of topics — from wealth management and investments, to tax planning and retirement — visit our [Insights Library](#).

## JOIN OUR TEAM!

If you, or someone you know, would like to learn more about job openings or student internship opportunities available at McKinley Carter, please visit our website's [Careers page](#) for more information.

We are always looking to expand our team with competent, ethical professionals who will complement our existing staff in the following communities: Wheeling (WV), Charleston (WV), Pittsburgh (PA), Johnstown (PA), Dayton (OH), and Gaithersburg (MD).

McKinley Carter is an SEC-registered investment adviser. For information pertaining to McKinley Carter's fees and services, please contact McKinley Carter for a copy of our disclosure statement as set forth on our Form ADV. For information pertaining to our registration status, refer to the Investment Adviser Public [Disclosure](#).



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