



## 2023 Q4 UPDATE

Wow did Santa come through with bountiful stock market gifts in the 4th quarter of 2023 after reaching a bottom in October of 2023!

Before, I take credit for predicting the future, which has certainly not been easy to do, I want to thank our valued clients for always being the best part of OneSource Wealth Management. We're ready to welcome you as a client too.

I can't tell you how many calls throughout 2023 I received from clients that were concerned about 2023 becoming another 2022 as far as results on investments were concerned. My response to those calls is not a typical one where other advisors would simply say, "Stay the course, everything will be fine." My response is to go through each type of investment that you had and discuss why I thought that it was a good fit for you with respect to helping you achieve your goals.



That being said, I too believed everything was in fact going to be fine with respect to your investments because we navigated much rougher waters in 2022 and rebalanced where necessary into new opportunities. We also locked in attractive prices with the potential for appreciation and high dividends in 2023 which came to fruition. Enough humble bragging.

So, what are we going to do in 2024 now that we are solidly in Q1 of 2024? First and foremost, as you hopefully already know, I have partnered with a stud on many fronts, Giuseppe Visconti, MSFE, CPM, CRPC. The most important front of his "studliness" is his track record as an advisor and portfolio manager helping



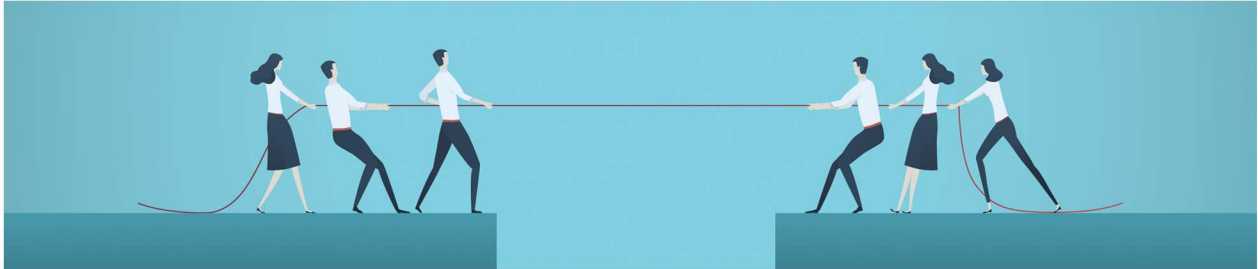


clients achieve their investment goals. With his help, Giuseppe and I are set up to help each and every one of our clients navigate whatever our country and this crazy world throws at us financially. The two of us can't solve all problems, but we will find the best possible solutions that are available in the industry customized to your specific needs and designed to give you the highest probability of success toward reaching your goals in 2024 and beyond.

Hopefully, my track record for predicting the future will remain high because I want to give you some thoughts on what I expect the near future to hold. If you have listened to our radio show, "The Wise Money Guy," (every Saturday on Talk 650 KSTE) our first prediction has already come true. That prediction was that short-term interest rates manipulated by the central bank, despite predictions from other analysts for many and early cuts to fed funds, would not happen and we were correct. Our additional early 2024 prediction was that there would be a sell-off as a result of interest rates not being cut in Q1 and that we did not believe that it would be the beginning of a major correction or crash, but an opportunity to BTDD (Buy the Dip).

Another super easy prediction that we have made is to watch for a choppy stock market as we get closer to election day. I do get asked or told, frankly a lot, that the market is going to crash if Biden gets re-elected and in a sick way, I wish that were true, but unfortunately control of the House and Senate is more important financially than who is president. Even though the markets in my prediction will be choppy this year, especially closer to election time historically, election years are good return on investment years.





There are other more drastic events that could take place this year such as the expansion of existing conflicts and the potential for new conflicts. There is a high probability that our Chinese enemies invade Taiwan. Initially this will trigger a sizable market correction that will, in turn, finally get the world to drastically change course from allowing China to control production of essential goods and services, ultimately collapsing their phony economy and hopefully destroying the communist control of China. If this does happen, you can bet that Giuseppe and I will make the fast and necessary changes to turn a terrible situation from an investment perspective into the best possible portfolios that we can build given the circumstances.

On a brighter and final note, we are off to a great start in Q1 and I do believe other than some bumps in the road that overall 2024 is going to be a very good year for our clients. If for any reason you want to chat or come in to discuss your accounts or concerns, please don't hesitate to do so. We'd welcome the opportunity to call you a valued client as well.

Warm Regards,

John

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