



WSG Monthly Newsletter

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**WEALTH
STRATEGY
GROUP**

January Kickoff

With a new year underway, January invites us to take stock of our priorities and chart a clear course for the months ahead. As you outline new goals or build on the progress you made last year, we are ready with thoughtful guidance and simple resources to support a strong and confident start to 2026. *If you have received a hard copy of this Newsletter and would like to subscribe, please go to the Resources tab on our website at www.wsginvest.com.*

Join us for coffee!



We will be hosting another 'Advisory Brew' this month!

Tuesday, January 20 at
9:30am ET – Donckers,
Marquette

Thursday, January 29 at
9:30am CT – What's Brewin',
Tomahawk

Congrats to Zac and Dale – our Buck Competition winners!



Dale topped Tomahawk's list with an 8 point, 190 lb. buck.



Zac took home the Marquette prize with an 8 point, 180 lb. buck.

Market Update: January Check-In

As we begin 2026, financial markets are coming off another strong, but far from smooth year. 2025 was marked by frequent headlines, shifting policy expectations, and bouts of volatility. As has been the case time and again, investors who remained disciplined and focused on long-term objectives were ultimately rewarded.

Year in Review

Equities finished the year on solid footing. U.S. stock markets delivered positive returns, led primarily by technology and communication services. Continued innovation, earnings growth among large-cap leaders, and investor optimism around productivity gains supported these sectors.

Interest rates moved lower. The Federal Reserve began easing monetary policy over the course of the year as inflation moderated. Lower rates provided support to both equity and fixed income markets, while easing financial conditions more broadly.

Inflation remained contained despite new pressures. While tariffs and global trade dynamics introduced potential inflationary risks, overall price pressures remained manageable, allowing policymakers flexibility heading into the new year.

Precious metals experienced strong gains. Gold and silver rallied meaningfully during the year, benefiting from declining interest rates, geopolitical uncertainty, and continued demand for portfolio diversification.

International markets contributed positively. Non-U.S. equities posted respectable performance, reinforcing the value of global diversification rather than relying solely on domestic markets.

The economy remained resilient. Economic growth stayed positive, consumer spending held up reasonably well, and while the labor market showed signs of cooling, conditions remained stable by historical standards.

Looking Ahead to 2026

Business conditions could remain supportive. The continuation of existing tax policy may provide a tailwind for corporate earnings and capital investment.

Valuations warrant attention. Equity valuations remain above long-term averages in several areas of the market, which may limit upside and increase the likelihood of periodic volatility.

Economic growth is expected to continue. Most forecasts call for positive GDP growth, though likely at a more moderate pace, as the economy adjusts to a post-tightening environment.

Staff's Choice Recipe

Lori's Tomato Soup



Ingredients:

15 large tomatoes (5 pounds), seeded and quartered
1/4 cup plus 2 tablespoons olive oil, divided
8 garlic cloves, minced
1 large onion, chopped
2 cups water
1 teaspoon salt
1/2 teaspoon crushed red pepper flakes, optional
1/2 cup heavy whipping cream
Fresh basil leaves, optional

Instructions:

Preheat oven to 400°. Place tomatoes in a greased 15x10x1-in. baking pan. Combine 1/4 cup oil and garlic; drizzle over tomatoes. Toss to coat. Bake until softened, 15-20 minutes, stirring occasionally. Remove and discard skins.
Meanwhile, in a Dutch oven, sauté onion in remaining 2 Tbsp. oil until tender. Add tomatoes, water, salt and, if desired, pepper flakes. Bring to a boil. Reduce heat; cover and simmer until flavors are blended, about 30 minutes. Cool slightly.
In a blender, process soup in batches until smooth. Return to pan. Stir in cream and heat through. Sprinkle with basil if desired.

New Year Trivia

The first person to call or [email](#) with the correct answers wins WSG swag!

- 1). When was New Year's celebrated in Ancient Rome?
- 2). When did the New Years Eve Ball first drop in Times Square?
- 3). What does "Auld lang syne" mean?
- 4). How much does the Times Square ball weigh?
- 5). What city is home to the New Year's Day Mummings Parade?

December Edition Answers:
1-Pointsettia, 2-Cupid, 3-Gingerbread, 4-Eggnog, 5-Jingle Bells,

Final Thoughts

We hope this edition has provided you with valuable insights as we step into a new year together. If you're feeling ready to talk through your plans or revisit your approach, we are always here to guide you. We look forward to supporting you through a strong and purposeful 2026.

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