



# CURRENTS

**Helping readers navigate the swirling forces  
impacting their financial future.**

**SEPTEMBER 2025**

*Welcome to the 3Q2025 edition of Currents!* In this issue, we have selected a variety of blogs — all written by MCWS team members — that address key concerns we hear the most from our clients.

Our goal for *Currents* is a simple one: To provide readers with valuable information that will help them build financial confidence.

If you would like to explore other topics of interest, be sure to use the search tool in our [INSIGHTS](#) library.

As always, if you have questions about your specific financial situation, I'm here to help. Please reach out to me at the phone number listed below, or feel free to complete our [Contact Us](#) form.

Happy Autumn!

[McKinley Carter Wealth Services](#)

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## One Big Beautiful Tax Update

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

President Trump's "One Big Beautiful Bill" was packed with numerous changes to the tax code for both individuals and businesses, and also resolved many of the questions around the tax provisions of the 2017 Tax Cuts and Jobs Act. Check out this summary of the One Big Beautiful Bill Act (OBBBA) changes that will most likely affect your individual income tax picture.



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## The AI Risk to Your Financial Security: What Clients Should Know

By *McKinley Carter Wealth Services*

As Artificial Intelligence (AI) becomes more prevalent in our day-to-day lives, we are committed to safeguarding client assets, privacy, and trust. We not only keep pace with the threats that AI poses, but proactively defend against them



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# Succession Planning: 8 Steps to Successfully Sell Your Business

By [Teresa Michaels, CFP®](#), [Financial Strategist and Regional Manager](#)

Business succession plans are often complex but are critical for any business owner. If your succession plan hinges on the future sale of your business, here are the eight steps you should consider.

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