



THE ANCHOR

A MONTHLY NEWSLETTER FROM ANCORA WEALTH PARTNERS

March 2024

May your madness this month be limited from filing your taxes, pulling for your favorite basketball team, or maybe even anticipating the upcoming warm weather and all things that come with spring.

We would like to wish you a Happy St. Patrick's Day and a Blessed Easter!

Angie, Melissa, Kasey & April

Market Recap for March 2024

Index	01/31/2024	02/29/2024	Monthly Change	Monthly % Gain/Loss
DJIA	38,150.30	38,996.39	846.09	2.17%
NASDAQ	15,164.01	16,091.92	927.91	5.77%
S&P 500	4,845.65	5,096.27	250.62	4.92%

Index	2024 YTD Change	2024 YTD % Gain/Loss
DJIA	1,306.85	3.35%
NASDAQ	1,080.57	6.71%
S&P 500	326.44	6.41%

The information contained in this email does not purport to be a complete description of the securities, markets or developments referred to in this material and does not constitute a recommendation. The Dow Jones Industrial Average (DJIA), commonly known as "The Dow" is an index representing 30 stocks of companies maintained and reviewed by the editors of the Wall Street Journal. The S&P 500 is an unmanaged index of 500 widely held stocks that is generally considered representative of the U.S. Stock market. The NASDAQ composite is an unmanaged index of securities traded on the NASDAQ system. Keep in mind that individuals cannot invest directly in any index and index performance does not include transaction costs or other fees, which will affect actual investment performance. Individual investors' results will vary. Past performance does not guarantee future results. Investing involves risk and investors may incur a profit or a loss.

Trivia Questions:

1. What vegetable is associated with St. Patrick's Day in March?
2. What holiday do mathematical people celebrate on March 14th?
3. Who is the first woman to win a Nobel Prize?

Answers on page 4

Help Slam the Scam

On National Slam the Scam Day and throughout the year, the Social Security Administration gives you the tools to recognize Social Security related scams and stop scammers from taking advantage of your financially and access to your personal information.

Help protect your loved ones and people in your community this Slam the Scam Day by:

- Educating them about government imposter scams. Let them know they shouldn't be embarrassed to report if they shared personal information or suffered a financial loss. It is important to report the scam as quickly as possible.
- Sharing this information from our fact sheet and helping educate others about how to protect themselves.

Recognize scammers, they may:

- Pretend to be from an agency or organization you know.
- Say there is a problem or promise a prize.
- Pressure you to act immediately.
- Tell you to pay in a specific way.

How to avoid a scam:

- Remain calm. Talk to someone you trust.
- Hang up or ignore the message. DO NOT click on links or attachments.
- Protect your money. Criminals will insist that you pay in a hard-to-trace manner, such as with a gift card, prepaid debit card, cryptocurrency, wire transfer or by mailing cash.
- Protect your personal information. Be skeptical of a contact you didn't initiate.
- Spread the word. Share your knowledge of Social Security related scams. Post on social media using the hashtag #SlamtheScam to share your experience and warn others. Visit ssa.gov/scam for more information. Please also share with your friends and family.

In addition to these, you can always report Social Security related scams to the Social Security Office of the Inspector General (OIG).

Source: Social Security Administration



WHO KNEW...

U.S. citizens didn't pay federal income tax until the Civil War.

Tax time

Essentials to file an accurate tax return

The deadline this tax season for filing your personal tax returns is April 15, 2024. However, those who live in Maine or Massachusetts will have until April 17, 2024, to file due to official holidays observed in those states.

Taxpayers are advised to wait until they receive all their proper tax documents before filing their tax returns. Filing without all the necessary documents could lead to mistakes and potential delays.

It's important for taxpayers to carefully review their documents for any inaccuracies or missing information. If any issues are found, taxpayers should contact the payer immediately to request a correction or confirm that the payer has their current mailing or email address on file.

Creating an IRS online account at www.irs.gov can provide taxpayers with secure access to information about their federal tax account, including payment history, tax records and other important information.

Having organized tax records can make the process of preparing a complete and accurate tax return easier and may also help taxpayers identify any overlooked deductions or credits.

Taxpayers who have an Individual Taxpayer Identification Number or ITIN (example being with a trust) may need to renew it if it has expired and is required for a U.S. federal tax return. If an expiring or expired ITIN is not renewed, the IRS can still accept the tax return, but it may result in processing delays or delays in credits owed.

Always consult with a CPA or tax professional for guidance and advice. Ancora Wealth Partners cannot offer advice or tax preparation.

Source: IRS's Tax Time Guide 2024

Women's History Month

About Women's History Month

Women's History Month had its origins as a national celebration in 1981 when Congress passed Pub. L. 97-28 which authorized and requested the President to proclaim the week beginning March 7, 1982, as "Women's History Week".

Throughout the next five years, Congress continued to pass joint resolutions designating a week in March as "Women's History Week". In 1987 after being petitioned by the National Women's History Project, Congress passed Pub. L. 100-9 which designated the month of March 1987 as "Women's History Month".

Between 1988 and 1994, Congress passed additional resolutions requesting and authorizing the President to proclaim March of each year as Women's History Month. Since 1995, presidents have issued a series of annual proclamations designating the month of March as "Women's History Month".

These proclamations celebrate the contributions women have made to the United States and recognize the specific achievements women have made over the course of American history in a variety of fields.

Source: www.womenshistorymonth.gov

March and a smidgen of April HOLIDAYS AND FUNDAYS

March 01: World Day of Prayer
March 03: Caregiver Appreciation Day
March 04: Hug A GI Day
March 06: National Oreo Cookie Day, *Dentist's Day*
March 08: International (Working) Women's Day
March 10: Daylight Savings (begins at 2:00am)
March 12: Plant a Flower Day
March 14: National Pi Day, *Popcorn Lover's Day*
March 17: St. Patrick's Day, *Corned Beef and Cabbage Day*
March 19: Earth Day, *Spring Equinox*
March 20: International Day of Happiness, Proposal Day
March 25: Pecan Day (bake a pecan pie!!)
March 29: Good Friday, *National Mom & Pop Business Owners Day*
March 31: Easter Sunday

April 01: International Fun at Work Day
April 03: National Walking Day
April 05: Deep Dish Pizza Day

Source: *Holiday Insights*



St. Patty's Day

7 Surprising Facts about St. Patrick's Day

Who was the real St. Patrick? Was that legend about the snakes true? And why did so many St. Patrick's Day traditions start in America?

While St. Patrick's Day is now associated with wearing green, parades (when they're not canceled) and festivities, the holiday is grounded in history that dates back more than 1,500 years. The earliest known celebrations were held in the 17th century on March 17, marking the anniversary of the death of St. Patrick in the 5th century. Here are some facts about the holiday's history and how it evolved into the event it is today:

1. The real St. Patrick was born in Britain.
2. There were no snakes around for St. Patrick to banish from Ireland.
3. Leprechauns are likely based on Celtic fairies.
4. The shamrock was considered a sacred plant.
5. The first St. Patrick's Day parade was held in America.
6. The Irish were once scorned in America.
7. Corned beef and cabbage were an American innovation.

Source: *History.com*

**"You shouldn't just work on your jump shot. You should work on being a better person, a better teammate, and a better friend."
-Sue Wicks**

Local Company Spotlight

Love Language Bakery

Julia Mason, Owner
(336)-417-1981



Trivia Answer

1. Cabbage
2. Pi Day since it is 3.14
3. Marie Curie

Chicken Pie

Ingredients:

- 1 Large Rotisserie Chicken
- 1 Can of Cream of Chicken soup
- 1 Sheet of Puff Pastry
- 1 Tbsp. of Melted Butter

Directions:

Preheat oven to 400 degrees.
Remove and shred chicken on rotisserie chicken.
Mix in the can of cream of chicken soup.
Spray a 9X13 casserole dish with non-stick spray.
Pour chicken mixture into baking dish.
Lay the puff pastry on the chicken mixture.
Brush melted butter on crust.
Bake for 15 minutes or until golden brown.
Other crusts to use:
Cut up biscuits or croissants unrolled.
Tips: If the mixture is too thick, add a little chicken broth.
You can always make the pie a little thicker and use the same ratio of chicken to soup.



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We Welcome your feedback. Please email us at Angie@AncoraWealth.com with any questions or suggestions pertaining to this publication. We want the information we provide to be of value to you.
(336) 967-6497

2006 S. Church Street Suite A, Burlington, NC 27215

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