



ANCHOR
WEALTH STRATEGIES

Cheers to Growth

May 14th, 2026. We welcome you to stop by anytime between 5:30 - 7:30. Come meet our new staff members Morgan and Gio as well and enjoy some food from Rockin Rooster.

[Click Here to RSVP](#)



For Her Bloom Bar

May 8th, 2026. We welcome you to stop by anytime between 3:30 - 5:30. Celebrate the special women in your life at our Flowers for Her Bloom Bar! Create your own beautiful arrangement to take home and enjoy a relaxing, creative afternoon



[Click Here to RSVP](#)

Quick Tax Tips

- File Early, Reduce Stress
- Check Your Withholdings
- Maximize Deductions
- Consider Retirement Contributions
- Organize Documents
- E-File & Direct Deposit
- Beware of Scams – IRS won't call demanding immediate payment. Verify first.

Retirement should feel like this -



[EXPLORE YOUR OPTIONS](#)

Like seeds in soil, your plans take hold,
Nurture them with care and patience.
April rains may come and go,
But steady growth will surely show.



Are Your Social Security Benefits Taxable This Year?

More than 70 million Americans receive benefits from the Social Security Administration—whether retirement, disability, or Supplemental Security Income (SSI). One big question recipients face ever year at tax time: Do I owe federal income tax on those benefits? For a growing number of seniors in recent years, the answer has been yes, since the formula for determining whether Social Security is taxable hasn't been adjusted for inflation in more than four decades.

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Typically, Taxable Income	Typically, Nontaxable
Wages and Salaries	Gifts and Inheritance
Investment Income	Life Insurance Proceeds
Bussiness or selfemployment Income	Qualified Scholarships

Tax Fun Fact

During ancient Egypt, workers who built the pyramids were paid in grain and beer — and yes, that counted as taxable income!



Let's Stay Anchored

[SCHEDULE ONLINE](#)



Judy Polak, CFP®

LPL Financial
Advisor

judy.polak@lpl.com
817-778-0628

NEED A CHECK-IN OR HAVE QUESTIONS? I'M JUST A CALL OR CLICK AWAY!

Available for in-person or virtual meetings—just reach out!

KNOW SOMEONE
WHO COULD USE A
FINANCIAL
ANCHOR?

Referrals are the highest compliment we can receive.

If you have a friend, colleague, or family member who could benefit from personalized financial advice, we'd love to help them too!

Securities and advisory services offered through LPL Financial, a registered investment advisor, Member FINRA/SIPC.

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