



What to do with your bonus or year-end gains

- Review & Reset: Check 2025 performance, update your 2026 goals, and rebalance your portfolio.
- Build Safety First: Top up your emergency fund
- Kill High-Interest Debt: Pay off credit cards or loans above 6–7% interest.
- Max Tax Advantages:
 - Max out 401(k), IRA/Roth IRA, HSA, and 529 contributions early.
- Enjoy Responsibly: Treat yourself with 5–10% of your bonus — guilt-free but intentional.
- Plan for Taxes: Set aside funds or use deductions

Holiday Open House Recap

What a great way to wrap up the year! Thanks to everyone who stopped by our Holiday Open House. We loved sharing good cheer (and a few cookies!) with you.

Make 2026 the Year Your Money Works Harder Than You Do

Smart planning.
Steady investing.
Total freedom.



Let your money sweat the small stuff, smart inflation planning keeps your lifestyle chill.

[EXPLORE YOUR OPTIONS](#)



Seven Practical Steps to Kick Off Your 2026 Financial Planning

Redefining financial success requires both reflection and action. The following steps can bring clarity to your goals, create alignment with your family and allow you to move into 2026 with a plan that feels both purposeful and achievable.

Step No. 1: Clarify your values. Write down the principles that guide your decisions, whether family security, philanthropy, lifestyle goals or something else. This list becomes the filter for every financial choice.

Step No. 2: Prioritize your objectives. Separate "must haves" from "nice to haves." Paying for children's education might be essential, while a vacation home is a bonus. Ranking goals prevents competing priorities from derailing the plan. To continue reading [click here](#)

As we kick off 2026, we want to express our gratitude for clients like you. Wishing you and your family a happy and prosperous New Year filled with joy, laughter, and memorable moments

[SCHEDULE ONLINE](#)



**KNOW SOMEONE
WHO COULD USE A
FINANCIAL
ANCHOR?**



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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!

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

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