

Client Newsletter – March 2023

ADVISOR'S PERSPECTIVE

This is our first quarterly newsletter. These updates will be posted on a quarterly basis and will highlight (1) new resources available to our clients, (2) upcoming service calendar deliverables for our Ongoing Financial Planning clients, and (3) key dates our clients should be aware of over the next 90 days.

NEW RESOURCES AVAILABLE

1. Our website update is expected to go live by April 10, 2023. This will offer enhanced mobile access, client login to our 3rd party partner sites, and a new page with insights and resources.
2. A new education module, The Fundamentals of Estate Planning, is now available within our Education Services offerings.
3. We recently completed a White Paper titled, "Should I Pay Off My Mortgage Early?". This resource outlines the factors to consider when assessing the pros and cons of paying off a loan early.

Q2'2023 SERVICE CALENDAR TOPICS

APRIL: INSURANCE

Eustace Advisors will provide educational information related to insurance coverage. This month's focus will be on the various types of life insurance.

MAY: ESTATE PLANNING

Eustace Advisors will provide educational information related to estate planning. An overview of the estate planning process and key terms will be this month's focus.

JUNE: INSURANCE AND ESTATE PLANS - INDIVIDUAL CLIENT REVIEWS

KEY UPCOMING DATES

APRIL 18: income tax returns are due.

APRIL 18: last date to make an IRA contribution for 2022.

APRIL 18: 1st Estimated Tax payment for 2023 is due.

JUNE 15: 2nd Estimated Tax payment for 2023 is due.