Coaching Corner

New Year, New Limits!

The IRS is raising the general 401(k), 403(b), and 457 plan deferral limit to $24,500 for 2026, up from $23,500 in 2025. If you are 50 or older, you can contribute an additional catch-up amount of $8,000 for 2026, up from $7,500 in 2025. If you are 60, 61, 62, or 63 you can contribute a catch-up amount of $11,250 for 2026.

Give Yourself a Raise

Reminder: If you haven't hit your 2025 contribution limits yet, there's still time to increase your annual max! Log in to your account online and adjust your contributions today to make the most of your savings potential.

A Complimentary Money Coach Education Program for YOU

Meeting 1:1 with a Financial Advisor gives you a holistic view of your financial situation and personalized guidance tailored to your life stage - helping you stay on track to reach your goals with confidence!



PURSUE YOUR GOALS | MAINTAIN CONFIDENCE | BALANCE RISK, REWARDS

OUR SERVICES

Our team offers a range of planning resources and services to help you reach your goals: *

- Comprehensive portfolio management
- Ongoing investment monitoring
- Periodic reviews
- Financial planning
- Wealth management
- Income distribution
- Retirement planning
- Investment strategies

Coordination with other professionals:

- Insurance solutions
- Estate planning
- Cash-flow & tax planning

Your Complimentary Financial Advisors


Scott Kimble


Russell McAlonie


Sarah Horn


Adam Sanders

Request a 1:1 Meeting HERE

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**Wealth management services are provided separately from the retirement plan consulting services you may receive from Oswald as a result of your participation in your employer's retirement plan. These services may involve a separate advisory agreement and include an additional fee.*

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