

APRIL NEWSLETTER

HAPPY EASTER & WELCOME SPRING



TAXES



MARKETS



PYLE FINANCIAL UPDATES

2026 UPDATES: Q2 IS HERE

Tax Season: Final Stretch

We are now in the final stretch of tax season, with the filing deadline on **April 15, 2026**. If you haven't filed yet, now is the time to finalize your documents and coordinate with your CPA.

If you need additional time, filing an extension moves your deadline to October 15, 2026—but keep in mind, any taxes owed are still due by April 15.

If you need help locating documents or have questions, our team is always here to assist—just give us a call.

What tax strategies remain?

As we move through 2026, our team at Pyle Financial Services is actively working alongside you to identify tax planning opportunities and strategies for the year ahead. **2025 is done.**

Proactive planning today can help create greater flexibility, efficiency, and confidence when it comes time to file. We are here to guide you through each step and ensure your financial plan remains aligned with both your goals and the evolving tax landscape.



Market Perspective

As we move through 2026, our team at Pyle Financial Services is actively working alongside you to identify tax planning opportunities and strategies for the year ahead. Proactive planning today can help create greater flexibility, efficiency, and confidence when it comes time to file. We are here to guide you through each step and ensure your financial plan remains aligned with both your goals and the evolving tax landscape.



Our strategy is built with you in mind, as we navigate each step together. Through our KeepMore process, we focus on creating opportunities for greater efficiency and long-term potential. While we cannot control market movement, as we move through the second quarter, markets will continue to respond to interest rates, inflation trends, and global developments.

Headlines may shift quickly, but long-term success is built on disciplined planning, diversification, and avoiding emotional decision-making during periods of short-term volatility. Staying focused on your long-term strategy remains one of the most important factors in achieving your financial goals.



GOING UP?

BUILDING UPDATE: PROGRESS CONTINUES

We're excited to share that progress on our new building continues to move forward smoothly. Each phase brings us closer to creating a space designed to better serve our clients and support our growing team.

We're also pleased to announce that the elevator shaft has now been installed—things are really, **LOOKING UP**, as we continue to move this project to the next level. We appreciate your continued support and look forward to sharing more updates soon.

APRIL HISTORY & FUN FACTS

Did you know...

- The first US Elephant arrived in 1796
- The Titanic struck an iceberg in the Northern Atlantic
- A severe hailstorm known as “Black Monday” killed over 1,000 soldiers in France in 1360
- April is associated with the blooming of “moss pink” wildflowers, which inspired the “Pink Moon” name
- The spring equinox marks the beginning of six months of uninterrupted daylight at the North Pole
- April 3, 1957: Elvis performed his first-ever concert outside the U.S. at Toronto’s Maple Leaf Gardens
- Spring Fever: Scientists believe longer days cause an increase in energy, creativity, and happiness, which is a real phenomenon
- Baby birds are born with the ability to sing, but they often don't learn how to until they hear other birds chirping in spring



YOUR Q2 FINANCIAL CHECKLIST

There is an amazing power in checklists, which is why we rely on them here at Pyle Financial. It's also why we like to put together a checklist for you, so that you can feel confident and organized in your journey.

Fortunately, this checklist isn't too long or intimidating. None of the tasks are difficult, and you may have handled some already. But each task is important in its own way. Put them all together, and you can shoot for the moon.

If you need help or have questions, please let us know. Have a great second quarter!

Q2 FINANCIAL CHECKLIST FOR 2026

Tip: Click the link below to Print this out and stick it on the fridge or somewhere else it will be seen. That way, you can check off the items one by one as you complete them!



TECHNOLOGY REMINDER

eMoney



If you need assistance accessing Schwab Alliance, eMoney, or any other technology platform, please contact **Michael Sokolik Jr.** He is happy to help ensure you stay connected and confident with your online tools.

- **eMoney 24/7 Access and Transparency:** You have access to an always-on, secure Client Portal, allowing you to check your financial health, track goals, and view up-to-date information on your own time.
- **Schwab Alliance:** It streamlines wealth management by enabling instant digital document approval, secure messaging, paperless reporting, and easy updates to personal information.

Other platforms such as alternative investments or annuities have secure web portals available to you as well. If you would like assistance accessing any technology contact **Michael** today michael@pfs4u.com



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And as always, our news & insights link is LIVE and full of great educational content for you, your family, and to share with those who can benefit!



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