JUNE 2026

NEWSLETTER

MID-YEAR MOMENTUM & SMART PLANNING FOR THE MONTHS AHEAD

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WELCOME TO JUNE

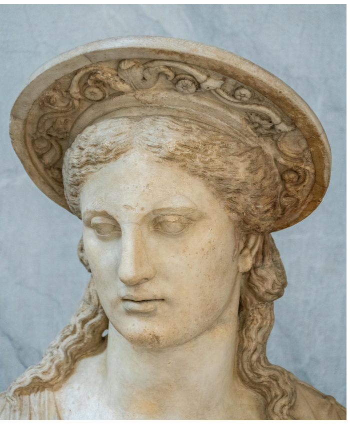
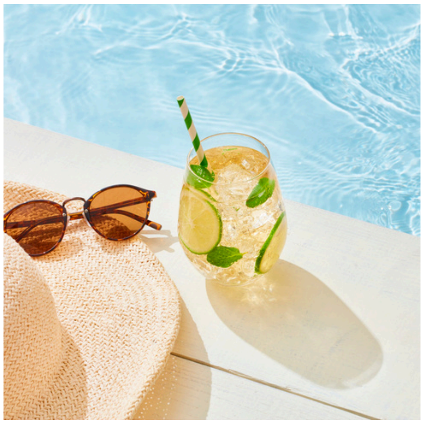
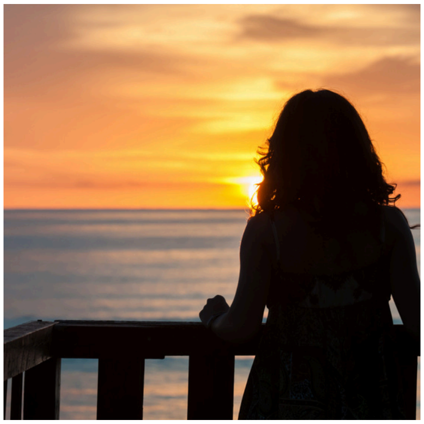
June marks the halfway point of the year—a natural time to pause, reflect, and evaluate progress toward your financial goals.

With summer beginning and schedules becoming more active, it's also an important opportunity to revisit planning strategies, investment positioning, and tax considerations before the second half of the year moves too quickly.

Just like a successful financial plan, the month of June reminds us that preparation today helps create confidence for tomorrow.

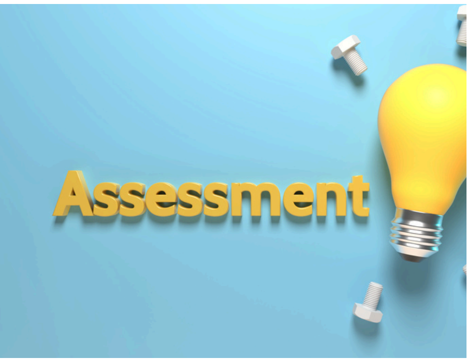
DID YOU KNOW?

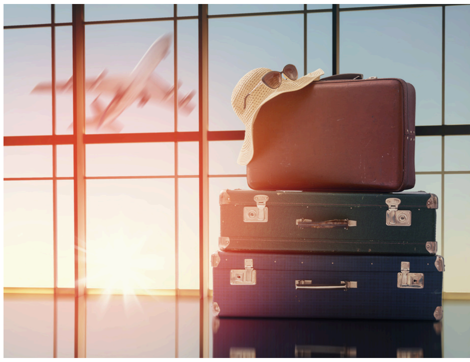
- June is named after Juno, the Roman goddess of marriage and prosperity.
- The first day of summer arrives on June 21, 2026.
- June is one of the most popular months for weddings, symbolizing growth, optimism, and new beginnings.
- The birthstone for June is the pearl, representing wisdom and integrity.


JUNE FINANCIAL FACTS

- Mid-year is one of the most common times for investors to reassess retirement contributions and tax strategies.
- Historically, markets often begin reacting to updated economic forecasts and Federal Reserve commentary during the summer months.
- Many families begin reviewing college planning, travel spending, and charitable giving goals during June and July.





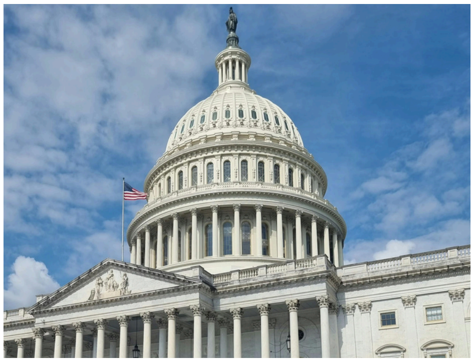
MARKET & TAX UPDATE

Q2 is here, and it's coming to a close soon. June 31st is the last day of the quarter. Just look back at how quickly the year has passed by. So, if you have put off planning with your trusted team at Pyle Financial, call us today.

As we move through the second quarter, markets continue to respond to inflation data, interest rate expectations, and ongoing global developments. Investors remain focused on Federal Reserve policy decisions and potential tax discussions surrounding future fiscal policy and government spending.

In Washington, discussions continue around long-term tax policy adjustments, including possible future changes to capital gains rates, estate planning thresholds, and business tax treatment. While no major federal tax legislation has been finalized recently, this remains an important reminder that proactive planning can help create flexibility as rules evolve.

At Pyle Financial Services, we continue monitoring these developments closely as part of our ongoing KeepMore planning process.



KeepMore™

MONEY TIP OF THE MONTH

Review Your Beneficiaries Mid-Year

One of the most overlooked financial planning tasks is keeping beneficiary designations current on retirement accounts, annuities, and life insurance policies. Major life changes such as marriages, births, deaths, or changes in family dynamics can significantly impact your wishes and long-term planning goals. A quick review today can help prevent unnecessary complications later.

NEW BUILDING UPDATE

Construction on our new building continues moving forward smoothly, and we're excited with the continued progress taking shape each week. We appreciate your support and look forward to sharing additional updates throughout the summer.

The Elevator shaft is built, the footers have been inspected and passed, the foundation has been poured, we're starting to think we're getting somewhere.

- [x] Elevator Shaft
- [x] Footers Inspected
- [x] Foundation poured
- [ ] Structural Framing
- [ ] Roofing
- [ ] Exterior Envelop
- [ ] Rough MEP
- [ ] Insualtion/Drywall
- [ ] Interior Finishes
- [ ] Trim out & Fixtures
- [ ] Site Work/Parking
- [ ] Punch List/Inspections

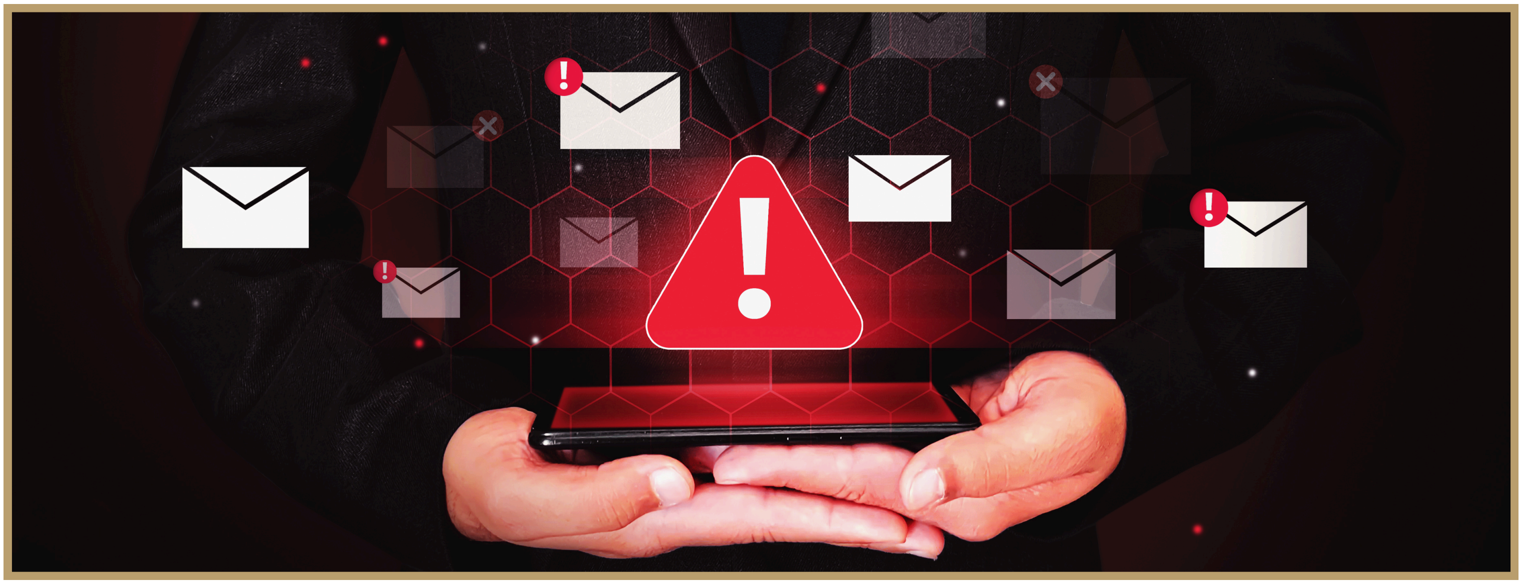
charles SCHWAB eMoney

TECHNOLOGY REMINDER

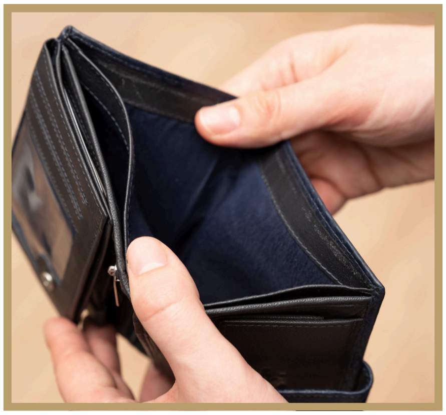
If you need assistance accessing Schwab Alliance, eMoney, annuities or any other technology platform, please contact **Michael Sokolik Jr**. He is happy to help ensure you stay connected and confident with your online tools.

- **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.

IMPORTANT FACTS ABOUT CYBER ATTACKS



- 7 in 10 households have exposed account passwords
- 1 in 4 families has malware on their phones, computers, or tablets right now
- 1 in 5 connected homes is accessible over the internet by strangers
- 75% of family offices in North America experienced a cyberattack in the past year
- Americans lost $16.6 billion to cybercrime in 2024. A 33% increase over 2023
- AI is now being used to clone voices, generate deepfake video, and craft phishing messages that no spam filter can catch



STAY CONNECTED

Follow Pyle Financial Services on Facebook and LinkedIn for market updates, educational insights, firm announcements, technology updates, holiday messages, and behind-the-scenes progress from our growing team.