



Newsletter JULY 2026



HAPPY INDEPENDENCE DAY FROM THE PYLE FINANCIAL TEAM

As we celebrate our nation's independence this July, all of us at Pyle Financial Services want to wish you and your family a safe and joyful Fourth of July. This season reminds us to be grateful for the freedoms we enjoy and the opportunities we have to build meaningful lives and lasting legacies.

Our team has been hard at work this summer conducting **mid-year reviews**, analyzing **2025 tax returns**, and preparing strategies for **2026 tax planning opportunities**. In the coming weeks, you'll also receive our **"Know What You Own" survey**, designed to help us better understand assets you may have outside of our firm so we can provide more comprehensive planning and guidance.



IN THIS EDITION:

- America 250 Fun Fact
- Mid-year Market Update
- Tax Return Review
- New Book Release
- Final Thoughts

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LIVEMORE
LOVEMORE
LEAVEMORE
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AMERICA 250 FUN FACT: THE STATE WHERE THE REVOLUTION WAS WON



Did you know that South Carolina is often referred to as the state where the American Revolution was won?

More than 200 battles and skirmishes of the Revolutionary War took place in South Carolina—more than any other colony or state.

Historians often credit the victories and sacrifices made here as playing a critical role in securing America's independence.

Turning Points: Crucial patriot victories in the state, such as the **Battle of King's Mountain** and the **Battle of Cowpens**, destroyed significant portions of the British army and shifted the war's momentum

The Attrition Argument: British General Cornwallis famously remarked that he could not maintain control of the South until he conquered the Carolinas, which ultimately forced him to move his weakened army toward Virginia.

The Official Conclusion: The war was legally and diplomatically won with the signing of the **Treaty of Paris in 1783**.

In their best SC fashion: The debate recently received renewed attention because the Palmetto State introduced official license plates bearing the slogan **"Where the Revolutionary War Was Won"**. Because South Carolina played such an instrumental part in bleeding out British resources, it is heavily celebrating its pivotal role during the commemoration of America's 250th Anniversary of the American Revolution.



MID-YEAR MARKET UPDATE

As we reach the halfway point of 2026, markets continue to navigate changing economic conditions...

As we reach the halfway point of 2026, markets continue to navigate changing economic conditions, including interest rates, inflation trends, corporate earnings, and global developments. Adding another layer of attention this year, 2026 is an election year, and markets often experience increased headlines and uncertainty during election cycles.

While election years can create short-term volatility, history has shown that long-term investment success is not built on predicting political outcomes but on maintaining a disciplined strategy, staying diversified, and focusing on long-term goals. At Pyle Financial Services, we continue to monitor developments closely while helping clients avoid emotional decision-making during periods of uncertainty.

Today's markets move faster than ever before. With advancements in technology, algorithmic trading, artificial intelligence, and the instant flow of information through news and social media, market volatility can accelerate in a matter of minutes rather than days or weeks. As a result, investors are experiencing more frequent and sharper swings in stock prices, often driven by headlines and sentiment rather than long-term fundamentals. This evolving environment reinforces the importance of having a disciplined investment strategy and a trusted advisor to help navigate short-term turbulence while staying focused on long-term goals.



TAX RETURN REVIEW & 2026 PLANNING

If you have not already done so, please submit your 2025 tax return to our office for review and planning purposes. Our team uses your return to identify opportunities and proactively prepare strategies for 2026.

You may:

- **Request a secure upload link from our office, or**
- **Upload your documents directly through the Vault feature in eMoney.**

If you choose to use the eMoney Vault, please notify our team once your documents have been uploaded so we can confirm receipt and begin our review.

NEW RELEASE: THE GENERATIONAL WEALTH BLUEPRINT



You may have heard...

We are proud to share a project more than a year in the making, "The Generational Wealth Blueprint: A Collaborative Guide to Building and Preserving Your Legacy." This book was created by an incredible group of advisors from the Wealth Legacy Collective, and Scott & Damon are grateful to stand alongside them in this work. The book reflects years of shared experience, meaningful conversations, and a deep commitment to helping families approach legacy with clarity and intention.

To our clients, thank you for trusting our team with your stories, your goals, and your hopes for the next generation. You are the reason that projects like this matter.

The book comes with access to our new microsite, complete with additional video insights. A special thank you to Pinnacle Marketing for their expertise and assistance.



**Click the Link Below to order
your copy today!**

FINAL THOUGHTS

As we celebrate our nation's independence this month, we're reminded that financial confidence and freedom are also built through thoughtful planning and intentional decisions. Thank you for the trust you place in our team. We look forward to continuing to serve you and your family throughout the remainder of 2026.

TECHNOLOGY & CLIENT SUPPORT REMINDER

Need assistance accessing Schwab Alliance, eMoney, USEDC, or another client platform? Our team is always available to help with login support, account access, and technology questions so you can stay connected and informed.

eMoney

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SCHWAB

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Development Corporation

HAPPY
Independence
Day



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