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WITH ALAN HENSLEY, CFP®
Wealth Advisor | Vice President

WISDOM & WEALTH

2026 EDUCATIONAL SERIES

» New Rules, New Opportunities *Planning for 2026*

Missed our last Wisdom & Wealth? Watch the Replay!

In our latest Wisdom & Wealth webinar, Alan Hensley breaks down the major retirement, tax, and planning updates arriving in 2026, including new 401(k) and IRA contribution limits, updated OBBBA tax rules, and key strategies to consider before the changes take effect.

Whether you're actively saving, preparing for retirement, or already retired, this session offers practical insights to help you plan with confidence and make informed financial decisions in the year ahead.

UPCOMING IMPORTANT DATES:

- » Juneteenth - Closed Friday, June 19th, 2026:
- » Independence Day - Closed Friday, July 3rd, 2026
- » Labor Day - Closed Monday, September 7th, 2026



**CLICK TO WATCH
THE REPLAY**

FINANCIAL INSIGHTS INTERNSHIP PROGRAM

This summer marks the 4th year of our Financial Insights internship program, and we're excited to introduce our current intern! Over the next 8 weeks, they will gain hands-on experience across multiple departments including client service, operations, marketing, financial planning, tax, investments, and advisory to learn more about the wealth management industry and the many roles that support our clients and firm.

Hi, my name is Lucas Kokich and I am a rising senior at Gonzaga University, where I am pursuing a double major in Accounting and Finance. This past semester, I had the opportunity to study abroad in Florence, Italy, gaining a global perspective that complements my passion for financial planning and wealth management. I am excited to bring fresh energy and a strong academic foundation to the team as an intern at Financial Insights Wealth Management this summer. Outside of the classroom, you can find me with friends on the basketball court or the golf course, or by myself relaxing with a good book or a new TV series.



2025 COMMUNITY IMPACT REPORT

WHERE WE SPENT OUR TIME

ANNIE WRIGHT, ASSOCIATED MINISTRIES, COMMUNITIES FOR A HEALTHY BAY, EFN, FIRST 5 FUNDAMENTALS, FIRST TEE SOUTH PUGET SOUND, GOODWILL, GREENTRIKE, HILLTOP ARTISTS, HORIZONS ECONOMIC FORECAST, LINDQUIST DENTAL CLINIC, MARY BRIDGE CHILDREN'S HOSPITAL, MULTICARE GOOD SAMARITAN FOUNDATION, MUSEUM OF GLASS, PALMER SCHOLARS, PUGET SOUND REVELS, ROTARY CLUB OF TACOMA #8, SOUND OUTREACH, SAINT PATRICK CATHOLIC SCHOOL, TACOMA LAWN TENNIS CLUB, TACOMA LIBRARY FOUNDATION, TCC, THE GOODTIMES PROJECT, SEATTLE SPORTS COMMISSION, UWT MILGARD SCHOOL OF BUSINESS.

ORGANIZATIONS TYPES

- EDUCATION & YOUTH DEVELOPMENT
- HEALTH & HUMAN SERVICES
- ARTS, CULTURE & COMMUNITY ENRICHMENT
- ECONOMIC DEVELOPMENT & CIVIC ENGAGEMENT
- ENVIRONMENTAL & COMMUNITY IMPACT

25 HOURS
COMMUNITY ORGANIZATIONS AND EVENTS

83 HOURS
PAID VOLUNTEER TIME OFF

LOCAL ORGANIZATIONS

SCHOOLS, AND NONPROFITS, RANGING FROM FOOD REPACKING AND HEALTHCARE ACCESS EVENTS TO YOUTH SPORTS COACHING, BOARD SERVICE, AND SCHOOL SUPPORT.

328 HOURS
SPENT VOLUNTEERING

2025 CORPORATE CITIZENS AWARD FROM PUGET SOUND BUSINESS JOURNAL: FIWM #8 IN WA STATE FOR COMPANIES UNDER 20M IN REVENUE.
PUGET SOUND BUSINESS JOURNAL

Financial Insights
WEALTH MANAGEMENT
FINANCIAL INSIGHTS IS B CORP CERTIFIED AS OF 2025

Certified
B
Corporation
This company meets verified standards for social and environmental business practices.
Learn more at bcorp.com



COMMUNITY CONNECTIONS WITH FI

At Financial Insights Wealth Management, giving back and staying connected to our community continues to be an important part of who we are. This season, our team participated in the EFN Hunger Walk, attended the Tacoma Community College Foundation Reach Higher Luncheon, and was a sponsor for the annual auction for Rotary 8.



2026 GOLF TOURNAMENT RECAP

The 3rd Annual Tacoma Business Golf Cup Invitational brought together local business leaders, clients, and community partners for a day of connection, competition, and community support at Trophy Lake Golf & Casting Club. Despite rainy weather, participants enjoyed a memorable event while helping support the impactful work of First Tee of Puget Sound. Thank you to everyone who participated, volunteered, and sponsored this year's tournament. View scores, photos, and event highlights below!



GROSS CHAMPIONS

13 under par



NET CHAMPIONS

17 under par



TOP FEMALE GROSS CHAMPS

2 under par



2ND GROSS CHAMPIONS

8 under par



2ND NET CHAMPIONS

16 under par



CLOSEST TO THE PIN



CLOSEST TO THE PIN



LONGEST DRIVE



LONGEST DRIVE



PUTTING CONTEST WINNER