Financial Insights
WEALTH MANAGEMENT

WEALTH MANAGEMENT • RETIREMENT • TAX

IN THIS ISSUE

- Wisdom & Wealth Recap ... Pg 1
- Deadlines by Operations ... Pg 1
- Upcoming Important Dates ... Pg 1
- Quarterly Staff Anniversaries ... Pg 1
- Community Connections with FI ... Pg 2
- Women to Watch Award Finalist ... Pg 2
- Futures 253 by Amanda Burrows ... Pg 3
- Look for the Sign - Exterior Sign ... Pg 3

YEAR END IMPORTANT DEADLINE DATES

RMD & QCD

- **11/15th** - Deadline to submit QCD request(s).
- **11/15th** - Deadline to take your RMD with QCD request(s).
- **12/1st** - Deadline to take your RMD via Journal, ACH or check to self. Does not apply to auto payment plan.

ROTH Conversion

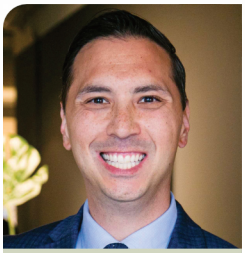
- **12/1st** - Deadline to request a Roth Conversion.

529 Plan

- **11/15th** - Deadline to open a new plan account with a contribution check or rollover transfer form.
- **12/1st** - Deadline to make a contribution to an existing plan.

Donor Advised Funds

- **11/30th** - Deadline to submit a grant request that does not meet auto-approval criteria.
- **12/4th** - Final day to open and fund a new DAF.
- **12/7th** - Deadline to make a DAF contribution. After this date, a client check will be mailed via USPS to Raymond James Charitable. The envelope must be postmarked by last day of the year, 12/31/2026.
- **12/11th** - Deadline to submit a grant request that does have auto-approval criteria.



ALAN HENSLEY, CFP®
Wealth Advisor | Vice President



MAI-LEE CODDINGTON
Senior Healthcare Advisor

WISDOM & WEALTH
2026 EDUCATIONAL SERIES

» Learn with Us
Medicare & Social Security 101

MISSED OUR LATEST WISDOM & WEALTH WEBINAR? WE'VE GOT YOU COVERED!

Alan Hensley, CFP®, and special guest Mai-Lee Coddington, Senior Healthcare Advisor, shared valuable insights and important updates on Social Security and Medicare. Whether retirement is right around the corner or already part of your journey, this two-part discussion offers helpful information to navigate your financial and healthcare decisions with confidence.

CLICK TO WATCH THE REPLAY

SMALL BUSINESS PARTNER

UPCOMING IMPORTANT DATES

- Thanksgiving - CLOSED - Thursday, November 26th, 2026
- Black Friday - Limited staffing from 8am-1pm - Friday, November 27th, 2026
- Save the date – FIWM Holiday Party - Wednesday, December 9th, 2026 from 4-7pm **RSVP HERE**
- Christmas Eve - CLOSED - Thursday, December 24th, 2026
- Christmas – CLOSED - Friday, December 25th, 2026
- New Years Eve - CLOSED at 1pm - Thursday, December 31st, 2026
- New Years Day - CLOSED at 1pm - Friday, January, 1st, 2027

QUARTERLY STAFF ANNIVERSARIES

- Alan Hensley, 3 Years
- Jordan Ford, 4 Years
- Cesia Wyatt, 2 Years
- Karan Springstead, 10 Years

1551 Broadway Suite 600
Tacoma, Washington 98402

253.627.6010
253.272.2927

financialinsights.com

COMMUNITY CONNECTIONS WITH FI

This fall, Financial Insights has been proud to support our local community through MultiCare's Rock the Foundation, Hilltop Artists Better Futures Luncheon, Emergency Food Network's Abundance Gala, and a team volunteer day repacking food at EFN.

As we head into the holiday season, we're continuing our efforts with an in-office food drive to help provide essential food items to local families in need.

We're also honored to be recognized by Emergency Food Network as a **"Partner in Plenty,"** celebrating our ongoing commitment to fighting hunger and supporting food security in Pierce County.

Thank you, EFN, for this meaningful recognition and for the incredible work you do for our community!











FINANCIAL INSIGHTS NAMED FINALIST FOR 2026 WOMEN TO WATCH AWARD

Financial Insights Celebrates National Recognition in New York City!

From Tacoma to New York City! Financial Insights Wealth Management had the incredible honor of being recognized as an **Excellence Awardee (Finalist)** for the Thrivent Financial Award for Excellence in Philanthropy and Community Service at the *2026 Investment News Women to Watch Awards!*

Ali Kemp, Jordan Ford, and Amanda Burrows traveled to NYC for the November 5th awards gala, enjoying an exciting evening celebrating remarkable women, leadership, and community impact throughout the financial services industry.

Being recognized on a national stage for our commitment to giving back is something we're truly proud of. Philanthropy and community involvement have been part of the heart of Financial Insights for more than 40 years, and it's exciting to see that dedication celebrated alongside so many inspiring organizations.

We're bringing home wonderful memories, inspiration, and a whole lot of Tacoma pride! Thank you to our clients, team, and community partners for being part of what makes Financial Insights so special.

Award Recognition Disclosure: Financial Insights Wealth Management was recognized as a [Winner/Excellence Awardee (Finalist)] in the Thrivent Financial Award for Excellence in Philanthropy and Community Service category at the 2026 InvestmentNews Women to Watch Awards, announced November 5, 2026. The awards recognize achievements in the financial services industry. Finalists are selected through nominations and independent research, with category winners determined by an independent judging panel using a points-based voting system and category-specific criteria. Nominations were accepted April 20 through June 19, 2026, with judging beginning in September 2026. There is no fee to submit a nomination, and Financial Insights did not pay to receive this recognition. Promotional opportunities are offered separately. This recognition reflects the firm's philanthropic and community involvement and does not evaluate investment performance, client satisfaction, or the quality of investment advisory services. For additional information about the selection process, visit https://womentowatch.investmentnews.com/process.



AMANDA BURROWS, CFP®, CSRIC®, EA®
Principal

FUTURES 253 BY AMANDA BURROWS, CFP®, CSRIC®, EA®

We're excited to share something happening right here in Tacoma Public Schools: Futures253.

If there is one thing I hope to leave better than I found it, it's financial literacy for young people. If I hadn't become a Certified Financial Planner, I'm not sure I would have learned many of the fundamentals of personal finance myself. These lessons aren't always taught at home or in school and investing and retirement planning don't exactly sound exciting to most teenagers.

Futures253 is changing that.

Through the program, Tacoma high school students can complete a paid internship and financial education course, then open a Roth IRA and invest at least $150 of their own earned income. After completing a reflection on what they learned, they can receive a $100 grant through the Tacoma Education Dream Fund.

Think about that: a teenager earns a paycheck, learns how investing works, opens a Roth IRA, and becomes an investor before graduating from high school.

Those of us in finance know it's not just about how much you start with. Time is one of the greatest advantages an investor can have. Even a small investment made at 16 or 17 has decades for potential growth, and the lessons learned can influence a lifetime of financial decisions.

At Financial Insights Wealth Management, this is exactly the kind of program that gets us excited about the future of financial education and equality. We're proud to call Tacoma home, proud to support opportunities for local youth, and hopeful that Futures253 becomes a model that spreads far beyond our community.

We're sharing Futures253 because programs like this deserve to be talked about, and we're excited to see what it could mean for the financial futures of Tacoma's young people.

Futures253 isn't just teaching students about money. It's helping them become investors.

FIND OUT MORE ABOUT FUTURES 253 HERE

LOOK FOR THE SIGN! OUR FIRST EXTERIOR SIGN IS UP, MAKING US EASIER TO FIND IN DOWNTOWN TACOMA!

