MONTHLY

NEWSLETTER

MAIN VIEW WEALTH

September 2026



A FALL RESET FOR CASH FLOW AND SAVINGS

TOP NEWS

- Year-end planning starts now.
- Beneficiary and estate-document checkup.
- A fall reset for cash flow and savings.

IMPORTANT DAYS

22nd: First day of fall

MONEY FOCUS

September is a useful time to review the items that can become harder to address once the holiday season begins. Review retirement-plan contributions and cash reserves.

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- Check beneficiaries on retirement and insurance accounts.
- Gather tax documents and note any major 2026 life changes.
- Schedule charitable gifts or required planning conversations early.

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SEPTEMBER IS A PLANNING WINDOW

Why look at year-end planning now?
By September, you have most of the year behind you and still have time to make thoughtful adjustments before December. A review now can help you identify decisions that require coordination among your financial, tax, legal, and benefits professionals

FOUR AREAS TO REVIEW

1. Cash flow and reserves Compare your current emergency savings with upcoming expenses. If cash has built up beyond what you need for near-term goals, decide how it should support your broader plan.

2. Retirement contributions, review what you have contributed so far this year and whether your current pace still fits your cash flow and retirement goals. Contribution limits and eligibility vary by account type.

3. Taxes and giving If your income, business activity, investment gains, or charitable plans changed this year, consider an early conversation with your tax professional. The goal is to avoid rushed decisions in December.

4. Beneficiaries and estate documents Confirm that beneficiary designations, wills, powers of attorney, and other planning documents still reflect your wishes, especially

RETIREMENT ACCOUNTS

If your employer provides a retirement plan match, it may be worth checking whether your current contribution allows you to take full advantage of that benefit. Regular contributions over time can help support your long-term retirement goals.

FROM OUR BLOG

Worried about whether you're saving enough, paying too much in taxes, or prepared for the unexpected? Discover how a financial plan can help: **Read more**

If you'd like to review your current financial situation or discuss planning options based on your individual goals and circumstances schedule a conversation with us.

BENEFICIARY CHECKUP

Review beneficiaries on retirement accounts and insurance policies after major life events or if it has been several years.



MEANINGFUL CAUSE

Use the change of season to revisit your plan.

Organize statements, refresh your net-worth snapshot, review upcoming renewals, and decide which year-end conversations should happen before December.

Support the fight against blood cancer:

Click here→ **1,000-miles charity ride**



A COMPLIMENTARY LEGACY PLANNING TOOL

We are excited to offer LifePlan, a legacy planning tool available at no cost to our clients.

LifePlan helps you:

- Organize and create important estate planning documents such as wills
- Clarify your wishes
- Create a structured legacy strategy
- Align your assets with your long-term goals
- This tool is designed to help you increase financial clarity and build a thoughtful plan for your wealth today and for future generations.
- If you would like access to LifePlan, contact our office and we will help you begin the process.

Stay connected

Take the next step in your financial journey by **scheduling a strategy meeting** with Greg and Phil. Select a Date & Time - Calendly

For dedicated **support with an existing** account, please contact Lisa at: lisa@mainviewwealth.com

Learn more About Us

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Referrals are great compliments. If you know small business owners who have been operating for over a year, we would welcome the opportunity to help them.

Reviews are also appreciated. Leave us a review on Google: Reviews Link https://maps.app.goo.gl/EswJ4GLbJWpCt3Xs7

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