

YOUR VALUES
OUR VISION
Together



NEWSLETTER

How Can We Help You at Tax Time?

- It's not too late to contribute to your IRA or Roth IRA for the 2018 tax year.
- Please let us know if we can help or connect with your tax advisor on any tax planning for this upcoming year.

How Might We Help You With Your Financial Future? With our new designations...



Bill Skavdahl, AAMS
Financial Advisor



Jeff Feuerstein, AWMA
Financial Advisor



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March 2019



Congrats to our team member Ben Cadman on his upcoming graduation from WSU! We are delighted he has chosen to stay in town and join the team full-time in June.



Nick Kayioni is studying Finance at WSU and is our newest intern.

...or with new Guided Investment Solutions

Guided investment solutions offers a range of tactical portfolios that can respond rapidly to potential short-term opportunities in the marketplace, along with dynamic portfolios that can adjust frequently to various market conditions. Read more about [these strategies](#).

Upcoming Events

Advisory Council Luncheon

March 28, Hilltop Inn 12 - 1 p.m.

Michelle Ellingwood from Palouse Care Network will be speaking on "Giving Great Advice".

Tax Freedom Day Celebration

April 23, Our office at 205 E Main St - 4:30 - 6:30 p.m.

Pullman Fire Chief Mike Heston will talk about how your tax dollars are making an impact on community safety and Sean Mahoney from MFS Investments will give us a market update. Come celebrate the day the average American has paid their tax bill.

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