

FIRST QUARTER 2021 HOLIDAY SCHEDULE

- ▶ **Monday, January 18, 2021**
Martin Luther King Day
Office closed.
- ▶ **Monday, February 17, 2021**
Presidents' Day
Office closed.

WHO IS MY CLIENT SERVICES REPRESENTATIVE?

- A - J — Cecelia Fisher**
- K - Z — Brandy Bailey**

BE ON THE LOOKOUT FOR 2020 TAX DOCUMENTS

ARE YOU WONDERING ABOUT YOUR REQUIRED MINIMUM DISTRIBUTION FOR 2021?

With the arrival of 2021, the IRA required minimum distribution has resumed for IRA account owners. If you are uncertain about your withdrawal requirement, we are ready to help you! Please call or email client services!

Last name starts with A - J

Call or email Cecelia Fisher

ceceliafisher@brileywealth.com

Direct line: (972) 866-4272

Last name starts with K - Z

Call or email Brandy Bailey

brandybailey@brileywealth.com

Direct Line: (972) 866-4270



Has your contact information changed?

Home phone number or disconnected home phone?

New mailing address?

New bank account?

New cell phone number?

New or multiple e-mail addresses?

Name change?



To avoid returned mail from the US Postal Service, please remember to inform FFSWM when your contact information changes. Vigilance is the best protection when monitoring your accounts.

Reminder: Any changes to your personal information at the broker requires a signed form. Please contact your client services representative to request a form. An email is not sufficient. Thanks! **Call us at (972) 934-9070**