

Fiduciary Financial Services Wealth Management

FIRST QUARTER 2021

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Fiduciary Financial Services Wealth Management

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THANK YOU, and Looking Forward!



Normally with our quarterly letter we try to share ideas that might be relevant at some point to each of you or to someone you know. But as we reflect on 2020, we want to extend a sincere word of thanks to all our clients for persevering with us through one of

the most volatile years in the history of the stock market and many bewildering life events.

One of the many changes that took place in 2020 was Paul Welch's retirement. Thanks to the many of you who took time to call or to send him your well wishes and good-byes. He is missed.

We think of the clients who have passed away, whether from COVID-19 or due to other reasons. We are grateful to have known each and every one of them and we grieve with their families.

We think of clients or their family members who contracted COVID-19 and recovered. We delight in their healing and we celebrate successful treatments and the distribution of the new vaccines.

We also think about those that have lost their jobs and are looking for direction and their next opportunity. We want to be available to you as a sounding board for hopeful encouragement or for a new perspective.

We are fortunate to work for each one of you and we are aware that we are very blessed. Thank you for your generous spirit towards us this past year. Thank you for the referrals and introductions to prospective clients. In this way, you are the life blood of our business!

As we anticipate what 2021 brings, (and wow, what a start it is already), we are in this together for whatever it may bring. We will continue to connect with you through regular account updates, through Zoom calls and traditional conference calls. We have added new software to enable us to better analyze cash flow needs for you.

If you have friends or family who could benefit from our services, we still have plenty of capacity to engage with new relationships. We welcome every opportunity.

Again, thank all of you for who you are from the entire Fiduciary Financial Services team. We anticipate a great year ahead!

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 - 7 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?



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