Fiduciary Financial Services Wealth Management

Michael Gavett
Managing Director, Investments
Senior Portfolio Manager
MichaelGavett@brileywealth.com
Direct line: (972) 866-4286

Richard Wright
Managing Director, Investments
Senior Portfolio Manager
RichardWright@brileywealth.com
Direct line: (972) 866-4292

Brandy Bailey
Client Services Representative
BrandyBailey@brileywealth.com
Direct line: (972) 866-4270

Cecelia Fisher
Client Services Representative
CeceliaFisher@brileywealth.com
Direct line: (972) 866-4272

Regina Kolkhorst
Operations Manager
ReginaKolkhorst@brileywealth.com
Direct line: (972) 866-2484

Meagan Womack
Operations Assistant
MeaganWomack@brileywealth.com
Direct line: (972) 866-4279

B | RILEY Wealth Management

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FEATURING GUEST SPEAKER

PAUL DIETRICH

Chief Investment Strategist

YOU'RE INVITED TO AN ECONOMIC SUMMIT

Make plans to join us on Monday evening, October 25, for an insightful conversation about markets and the economy.

When:
Monday, October 25
5:30 pm Reception | **6:15 pm** Presentation
Followed by Q & A Session

Where:
Dallas Country Club, Ballroom
4155 Mockingbird Lane, Dallas, TX 75205

Please RSVP by October 18
Email jfryar@brileywealth.com or call [214] 442-2904

Fiduciary Financial Services Wealth Management

13155 Noel Road, Suite 750
Dallas, TX 75240
Phone: 972-934-9070
Fax: 972-866-4294
Website: www.ffss.net

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2021 HOLIDAY SCHEDULE

- **Thursday, Nov. 25th, 2021**
  Thanksgiving Day
  Office closed

- **Friday, December 24, 2021**
  Christmas Day
  Office closed

WHO IS MY CLIENT SERVICES REPRESENTATIVE?

A - J — **Cecelia Fisher**

(972) 866-4272

K - Z — **Brandy Bailey**

(972) 866-4270

TOO MUCH PAPER?

CALL FFS TO OPT OUT OF PAPER MONTHLY REPORTS *

***signed form required**

2021 MARCHES ONWARD!

WE ARE READY TO HELP YOU WITH YOUR YEAR-END CHECKLIST!

√ Take time to BREATHE and RELAX! Get outdoors and enjoy the fall weather! Spend time making a gratitude list! It will lift your spirits!

√ Review your accounts and investment objectives with us. We would be happy to schedule a teleconference, in-person meeting, or a Zoom call! Let us know your preference and what is most convenient for you.

√ Plan for tax friendly charitable gifts and gifting to loved ones. Are you eligible for a qualified charitable gift from your IRA account? Verify ahead of time the proper way to send gifts to charity. Consult your tax planner or call your advisor.

√ If you normally pay property taxes in January, ask your tax planner if you could benefit by paying taxes early.

√ Re-visit beneficiary designations on IRA accounts, 401(k), life insurance policies and even taxable accounts. Has your family experienced new marriage, divorce, death or adoption? Did you know you can add a beneficiary to your bank account?

√ Examine your legal documents, like power of attorney, health power of attorney, last will and testament. Review who is assigned to the roles of executor, power of attorney or medical power of attorney. We would love to provide you with "the family love letter" to store this information and inform your family where to find these documents when needed. Call client services or your advisor to request one.

√ Make a financial fitness resolution to save more money and spend less next year! We can help you with that! Ask your advisor or client services associate for an appointment to examine and plan your cash flow needs.

Call FFS if you still need to take your IRA required minimum distribution for 2021! (972-934-9070)