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Financial *focus*

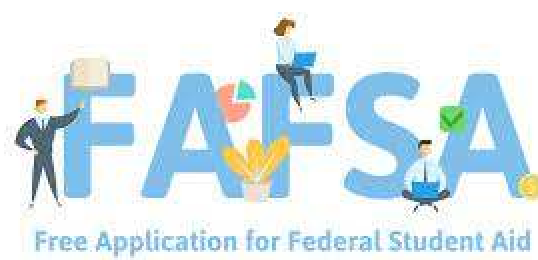
YOUR LIFE. YOUR PLANS. YOUR PORTFOLIO.

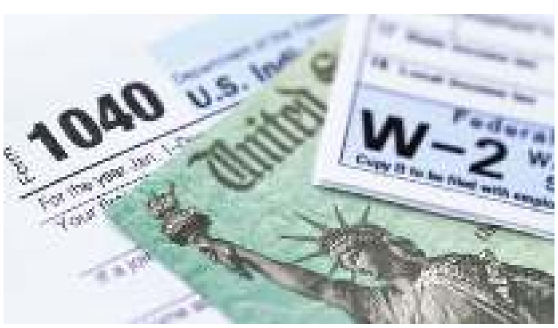
Do you currently have a child enrolled in college or are enrolling for the first time?

By completing the FAFSA, it gives you access to the largest source of financial aid to pay for college or career school. This is also used to determine eligibility for state and school aid. FAFSA needs to be completed every Spring for the next Fall.

Deadline is March 1st

Go to https://studentaid.gov/ to complete your application!
It's easy. It's resourceful. It's free!





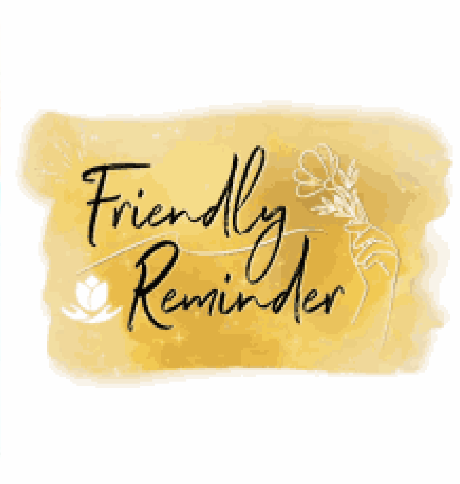
WHEN CAN YOU EXPECT YOUR 1099'S

Custodians have until March 15th to complete and publish your investment account 1099. However, there are some custodians* that often amend them throughout April and May.

National Financial Services – Online/Mailing January 31st through March 4th
Correction Cycles March 9th through April 13th

SEI Investment Trust* - Online January 20th
Mailing February 10th through February 24th
Correction Cycles March 9th through April 13th

TDAmeritrade/Orion – Online by January 13th
Mailing January 20th through February 24th
Correction Cycles March 9th through April 13th



Important Items

- Per FINRA, instructions for distributing or contributing funds need to by verbal communication. Emails and/or voicemails cannot be accepted unless you confirm your request by speaking to someone in our office.

  Our phone message and email signatures already inform all to not leave trade transactions via emails or voicemail.

- In his 30-plus year career, Andrew has made personal friendships with many clients resulting in his personal cell phone to be on hand. If you have a question or concern regarding your investments with Andrew, please call the office and not his, or any other advisor/administration cell phones.
  This is required by Regulatory Agencies

CONNECT WITH US

There are 3 ways you can connect with us and stay informed.

Our Website: https://www.privatefinancialdesign.com/
Here you can utilize helpful resources such as Client Portals (Statements and Tax Documents), Tax Guide, and other financial tools.

Our Facebook Page: https://www.facebook.com/privatefinancialdesign
Here you can read current articles and see what the staff has been up too outside of the office.

Our LinkedIn Page: https://www.linkedin.com/company/private-financial-design-llc
Here you can read current articles and connect with other local professionals.

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Your Life. Your Plans. Your Portfolio.