

MONTHLY

NEWSLETTER



June, 2026



MID-YEAR CHECK-IN ARE YOU AHEAD OR BEHIND?

TOP NEWS

- ◊ The Second Half of 2026 Starts Now.
- ◊ Retirement planning.
- ◊ Retirement Accounts.
- ◊ Insurance Awareness.
- ◊ 1,000 Mile Charity Ride.
- ◊ Estate planning tool available at no cost to our clients.



IMPORTANT DATES TO REMEMBER IN JUNE

- **June 14:** Flag Day
- **June 15:** Estimated tax payment deadline.

MONEY FOCUS

A key area to evaluate is cash flow. Understanding where your money has gone over the past few months provides clarity and control. If spending has increased without intention, this is an opportunity to redirect rather than restrict. Even minor adjustments can improve monthly flexibility and better align your finances with long-term goals.

HOW IS YOUR 2026 CHECKLIST COMING ALONG?

The first half of the year often moves faster than expected. A mid-year check-in is not about pointing out what has gone wrong. It is about identifying where a few intentional adjustments, even minor ones, can improve monthly flexibility and better align your finances with long-term goals.

START BY REVISITING THE GOALS YOU SET EARLIER THIS YEAR

Whether it was increasing retirement contributions, building savings, reducing debt, or updating insurance coverage, compare where you intended to be with where you are today. Many people find they are not far off track, just slightly inconsistent. That is an important distinction because small corrections now are often enough to get things back on course.

RETIREMENT PLANNING IS ANOTHER IMPORTANT CHECK POINT

Review your current contribution levels and determine whether you are on pace for annual targets. If not, consider a gradual increase.

Tax awareness also deserves attention mid-year. Estimating income, reviewing withholdings, and identifying potential deductions now can help reduce surprises later and create flexibility before year-end deadlines become a factor.

RETIREMENT ACCOUNTS

Confirm contributions are on pace for annual limits. If you have changed jobs or income levels this year, make sure your strategy reflects those changes. Small increases now can compound over time.

A retirement plan is built through consistency. Mid-year is a good point to reconnect your current contributions and investment strategy to your long-term income goals.

INSURANCE AWARENESS

Review your current coverage with a practical lens. Would your household be financially stable if income stopped temporarily or permanently? If not, this may be an area worth addressing.

If you are unsure whether this strategy makes sense for you, [click here](#) schedule a conversation with us.

PLANNING CORNER

Revisit your original 2026 checklist. Identify what has been completed, what is in progress, and what has been delayed. Prioritize the items that will have the greatest long-term impact rather than trying to do everything at once.

IMPORTANT QUESTION

How has the rising cost of travel impacted your summer travel plans?



MEANINGFUL CAUSE

In July, Phil will be riding from John O'Groats at the top north east corner of Scotland down to the bottom south west corner of England. When he was 17 he was diagnosed with Leukemia, and so he is raising money for the Blood Cancer United charity.

Learn more

Click here → 1000 miles,

May 2026

www.mainviewwealth.com



A COMPLIMENTARY LEGACY PLANNING TOOL

We are excited to offer LifePlan, a legacy planning tool available at no cost to our clients.

LifePlan helps you:

- Organize and create important estate planning documents such as wills
- Clarify your wishes
- Create a structured legacy strategy
- Align your assets with your long-term goals
- This tool is designed to help you increase financial clarity and build a thoughtful plan for your wealth today and for future generations.
- If you would like access to LifePlan, contact our office and we will help you begin the process.

Stay connected

Take the next step in your financial journey by **scheduling a strategy meeting** with Greg and Phil. [Select a Date & Time - Calendly](#).

For dedicated **support with an existing** account, please contact Lisa at: lisa@mainviewwealth.com

Learn more About Us

Website: www.mainviewwealth.com

LinkedIn: [Main View Wealth, LLC | LinkedIn](#)

Referrals & Reviews

Referrals are great compliments. If you know small business owners who have been operating for over a year, we would welcome the opportunity to help them.

Reviews are also appreciated. Leave us a review here: [Google Reviews Link https://maps.app.goo.gl/EswJ4GLbJWpCt3Xs7](https://maps.app.goo.gl/EswJ4GLbJWpCt3Xs7)

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