



BUSINESS OWNER MAY, 2026 NEWSLETTER

KEY MAY UPDATES

May is when things slow down just enough to see clearly. Taxes are behind you and now your numbers tell the real story.

This is where small problems show up and where smart business owners fix them early.



Action Tip: Based on your current numbers, would reducing taxes now make a meaningful difference for you? We can walk through your situation and help you determine if this is a good fit no pressure, just clarity.



PRACTICAL STEPS FOR BUSINESS OWNERS

- Compare your actual results vs your plan.
- Identify where expenses are increasing.
- Review team productivity and workload.
- Start setting aside for June taxes.
- Look for one process to simplify.

KEY DATE

May 15 Nonprofit tax return deadline

3 IMPORTANT THINGS YOU SHOULD KNOW

Costs Are Still Rising for Small Businesses

Why it matters: Higher expenses can quietly reduce profits, so keep a close eye on margins.

Hiring Is Improving But Still Expensive

Why it matters: Adding team members requires clear ROI, so do not hire without a plan.

More Businesses Are Focusing on Efficiency

Why it matters: Improving systems and cutting waste is becoming more important than growth.

CASH BALANCE PLAN FINAL STRATEGY

As your numbers become clearer, this is the time to evaluate fit. A Cash Balance Plan can be effective for business owners with consistent profits who want to reduce taxes and accelerate long-term savings.

When structured appropriately, it may serve as one component of an overall financial strategy.

MONEY SAVER

Interest rates remain elevated and continue to impact borrowing and expansion decisions. Prioritizing liquidity and stability over growth are considerations.

FROM OUR BLOG

Do You Know Your Net Worth?

Understanding your full financial picture is key to making better decisions.

[→ Read more](#)

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. [→ 1000 miles](#)

“

Financial planning is about progress, not perfection.

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Let's 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

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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