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Your Trusted Partner For All Financial Issues



A [recent survey by Gallup](#) in partnership with Franklin Templeton shows that investors who work with a financial advisor are more confident in their investment strategy than those without an advisor.

Bernard Wealth Management helps clients develop the right investment strategy for their unique circumstances. If you have any doubts about your own investment approach, or just want a complimentary check-up, contact us!

Retirement Plan Contributions

For 2021, 401(k) and 403(b) contributions are limited to \$19,500, but those 50 and older can also do a catch-up of \$6,500.

The contribution limit for IRAs is \$6,000 with an additional \$1,000 as a catch-up. Contribution deadline for IRAs is April 15, 2021.

[IRS contribution limits](#)



Upcoming Dates

- **Monday, February 15th** – Presidents' Day; US Stock Markets Closed
- **Tuesday, February 16th** – 1099s mailed by Schwab
- **Friday, April 2nd** – US Stock Markets closed for Good Friday
- **Thursday, April 15th** - Tax Filing Deadline; deadline for IRA and Roth IRA contributions

Bernard Wealth Management is proud to be a Stopwatch Sponsor of the Lighthouse Challenge.



Building communities that end poverty.

There is still time to get involved - register or donate today:

www.lighthousemi.org/challenge



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Get In Touch

