

## Pinnacle View Wealth Management

Q2 Newsletter 2024

We are pleased to present our quarterly newsletter! Since the 2024 Tax Season is now in full swing, we're providing a few helpful resources to assist you during your filing process in addition to our insight of the month. If you have any questions, don't hesitate to reach out to the team!

### Team Spotlight:



#### **Maddie Alcorn**

- Financial Advisor  
- Certified Financial Planner CFP®  
- Qualified Plan Financial Consultant QPFC

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#### **My Role on the Team:**

I serve as our team's Planning Professional and Financial Advisor. I play a crucial role in guiding our clients toward achieving their financial goals and securing their financial futures. This includes the initial development of our client's Financial Plan, regularly monitoring the progress of these plans and reviewing any changes in our client's circumstances to ensure they remain aligned with their goals and objectives.



Pictured Left to right: Maddie Alcorn, Tim Metcalf, Stacy Morton, Jera Cain, Jack Regier

#### **What makes you passionate about work?**

In my role as a Certified Financial Planner®, I am driven and inspired by the profound impact I help make in people's lives. Every day, I am privileged to guide individuals through the complexities of financial planning, offering tailored strategies to navigate their unique circumstances. Whether it's helping a young family secure their first home, or assisting retirees in crafting a sustainable retirement plan, the opportunity to make a tangible difference is immensely rewarding.



#### **Hobbies & Interests**

Outside of the office, I enjoy soaking up our Arizona sunshine while hiking, playing golf with my husband (albeit, not well), playing at the playground with my daughter, or enjoying a patio with a cold beer. We are avid sports fans in our house, and enjoy watching anything in-season. College football is amongst our favorite, but hockey is a very close second!



I also enjoy volunteering with Morgan Stanley and the organizations they support in our community. Most recently, I helped build a playground with Kaboom! and put together gifts with The Foster Alliance.

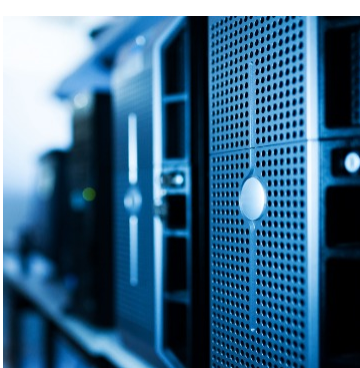
#### **Family Life**

My husband Nate and I met in college at Northern Arizona University and have been together for 11 years (married for 6). We have an almost two-year-old daughter, Callaghan (Callie for short), who is the absolute joy of our lives. The new journey as a family of three (and four-legs including our rescue dog, Abbey) has been full of learning, love, and laughter!



## Last Minute 2024 Tax Resources

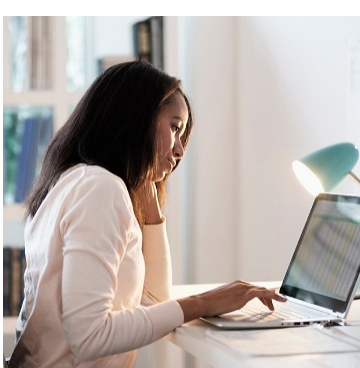
Resources to help you during Tax Season



#### **Tax Season Cybersecurity Tips**

To help prevent tax fraud, consider filing your taxes early, using secure filing websites and creating strong passwords.

[Learn More Here](#)



#### **Morgan Stanley Tax Documents**

It's Tax Season! All of your 2024 tax forms and information can be accessed within your Morgan Stanley Online account.

[Login to Morgan Stanley Online](#)

## Insight of the Month

Trending Article of the Month



#### **5 Ways to Spring-Clean Your Finances**

A lot can pile up over a year, or just a season. Here are five tips to help you tidy up, declutter and organize your finances this spring.

[Read More](#)

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