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The Capital of Texas Group
at Morgan Stanley

From left to right: Lee K Meeks, Financial Advisor, Russell Cowman, Financial Advisor, Patty Brueckner, Senior Registered Client Services Associate

Winter Newsletter

401(k) Catch-Up Contributions

Starting this year, workers between 60 and 63 can make a super catch-up contribution of up to $11,250, the IRS said last Friday. That is about 14% more than in 2024 and marks the biggest change to 401(k) contribution rules in two decades. Learn more below.

Learn More

Notable Changes for Tax Year 2025

The tax year 2025 adjustments described below generally apply to income tax returns to be filed starting tax season 2026. Learn more about increases to a variety of key thresholds, projected brackets, standard deductions and more here.

Read More

Tech That Could Define the Decade

The 2020s have already brought major tech advancements, including generative AI and smart chemotherapy. Demographic trends and rapid tech diffusion may spur more innovation, potentially creating new products and markets by 2030. Learn more below.

Learn More

Russell Cowman, First Vice President, Financial Advisor, Senior Portfolio Manager, Lee K Meeks, First Vice President, Financial Advisor, Family Wealth Advisor, Certified Financial Planner, Patty Brueckner, Senior Registered Client Services Associate

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