

## New Year Newsletter 2026

The Loscalzo Group At Morgan Stanley

Happy New Year! We hope you had a relaxing and joyful holiday season and wishing you health and happiness in 2026. Below you can find a few resources to help get you organized for the new year ahead, an insightful virtual client event, and some exciting news from the team. Please reach out if you have any questions, concerns, or would like to schedule a meeting.

### Exciting News From The Team

We are delighted to share that our team has been recognized in the 2026 Forbes Best-In-State Wealth Management Teams ranking<sup>1</sup>. This achievement is a testament to the trust and confidence you place in us, and we are deeply grateful for your continued support. We remain committed to raising the standards in our industry and delivering exceptional service.

Thank you for being an integral part of our journey.



### New Year Insights



#### Preparing for Tax Season

As tax filing deadlines approach, you can prepare for this year's taxes and next year's planning with the updated 2025 and 2026 tax tables.

[2025 Tax Tables](#) | [2026 Tax Tables](#)



#### 5 Personal Money Moves for the New Year

Heading into 2026, it's time to take stock of your budget, debt and investments—and check them against your financial goals. These five steps can get you started.

[Read More](#)



#### Maximum Benefit and Contribution Limits for 2026

The IRS has increased contribution limits for 2026. Click below for a detailed list of all the new contribution limits.

***You can still make your 2025 Contributions!  
If you haven't done so already, please reach out.***

[Read More](#)

## The Loscalzo Group

At Morgan Stanley

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**1. 2026 Forbes Best-In-State Wealth Management Teams** Source: Forbes (Awarded Jan 2026) Data compiled by SHOOK Research LLC based for the period 3/31/24-3/31/25. [Awards Disclosures](#) | [Morgan Stanley](#)

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