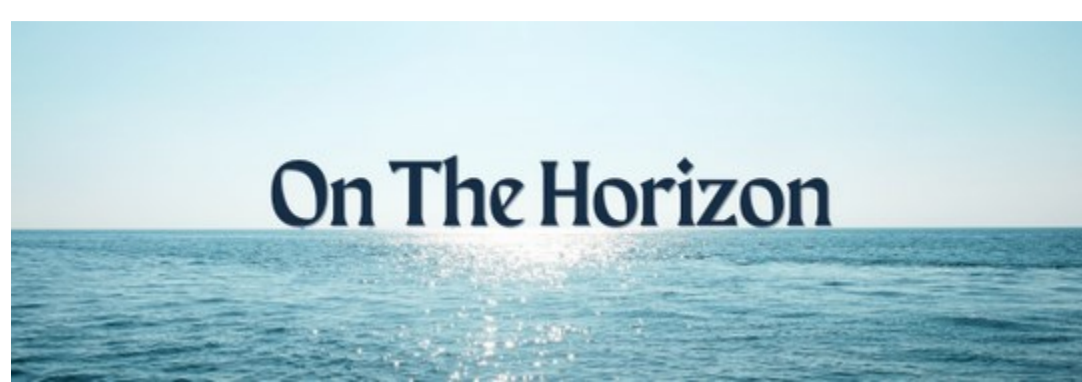




Thank you for the great feedback regarding last month's issue!

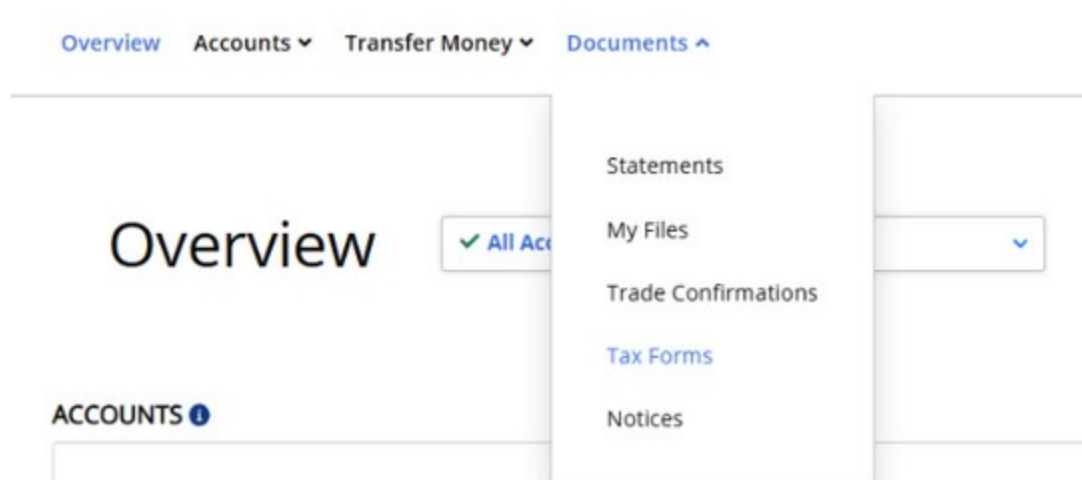
This month's edition includes some helpful tips about your tax forms, a message about Bonnie's work as a fiduciary, updates from the captain and crew, and a few dates for you to save!



### Accessing Your Tax Forms

The deadline for companies to produce most tax forms was January 31st.

If you're using Account View, it is easier than ever to get your LPL tax forms, just a few clicks away! From your Overview page, hover over the tab labeled "Documents" and click on "Tax Forms" from the drop down. Select 2024 as the tax year, and all your necessary forms will be available for you to download.



If you haven't accessed Account View, [reach out to Joelle](#) for instructions.

For those who prefer paper statements, LPL has been mailing tax forms in waves each week. As always, contact us if you would like assistance accessing your forms.



### What is a fiduciary?

You may have heard us mention that Captain Bonnie is a fiduciary. But what does that mean, exactly?

A fiduciary is a *financial professional who has an obligation to act in the best interest of their clients*. Fiduciaries have three main duties:

- **Duty of Loyalty:** Your interests come before the interests of the advisor or their firm.
- **Duty of Care:** The advisor works prudently and diligently for you to help reach your goals.
- **Duty to Follow Client Instructions:** While upholding company policies, a fiduciary will always reasonably comply with your instructions to the best of their abilities.

With her 26 years of experience in the industry, Bonnie has an unwavering commitment to acting in the best interest of you and every client in our practice.



Captain Bonnie and her pickleball partner scored a silver medal in their tournament last month: quite the accomplishment after losing their first three games, only to storm back to the finals.

Cost to play in the tournament: \$75

Cost of water, snacks, and Advil: \$50

Cost of the sore body parts to place in the winner's circle: Priceless!

First Mate Johanna is celebrating her birthday in a few days. Happy birthday, Johanna! We appreciate her for all she does to keep the First Anchor ship afloat and for her unwavering dedication to our clients.

Shipmate Joelle is approaching her first work anniversary at First Anchor this month. Reflecting on her first year, Joelle says, "I feel fortunate to be meeting so many of our amazing clients and love being part of a team that truly cares about the clients they serve."



### Save the Dates

**Isles of Shoals Private Chartered Cruise:** Saturday, June 28

**Community Night:** Saturday, September 20

We'll float more details to you soon...



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