



## Spring Cleaning Your Finances

Spring is often associated with clearing out closets, organizing garages, and refreshing our homes. It can also be a great time to take a fresh look at your financial life.

Just like our homes, financial plans can benefit from a little routine maintenance. Taking time once or twice a year to review your accounts and goals can help ensure everything remains organized and aligned with your long-term plans.

Here are a few simple areas worth revisiting:

### Review your accounts

Look over your investment and retirement accounts to make sure everything still reflects your current goals and risk tolerance.

### Check beneficiary designations

Life changes such as marriages, new children, or other family events may require updates to beneficiary information.

### Revisit savings goals

Whether it's retirement, education funding, or a future purchase, it can be helpful to confirm that contributions are still appropriate for your goals.

### Organize financial documents

Tax documents, insurance policies, and important financial records are easier to manage when they're organized and stored in one place.

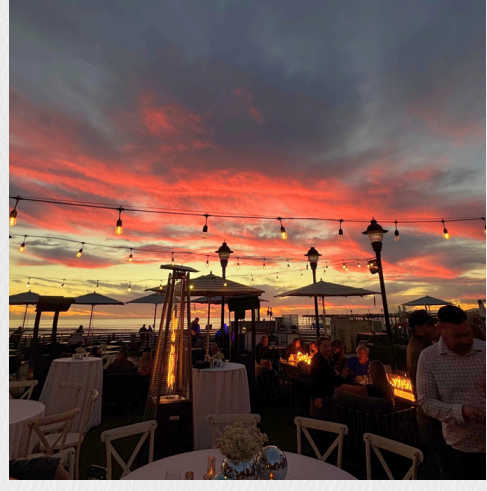
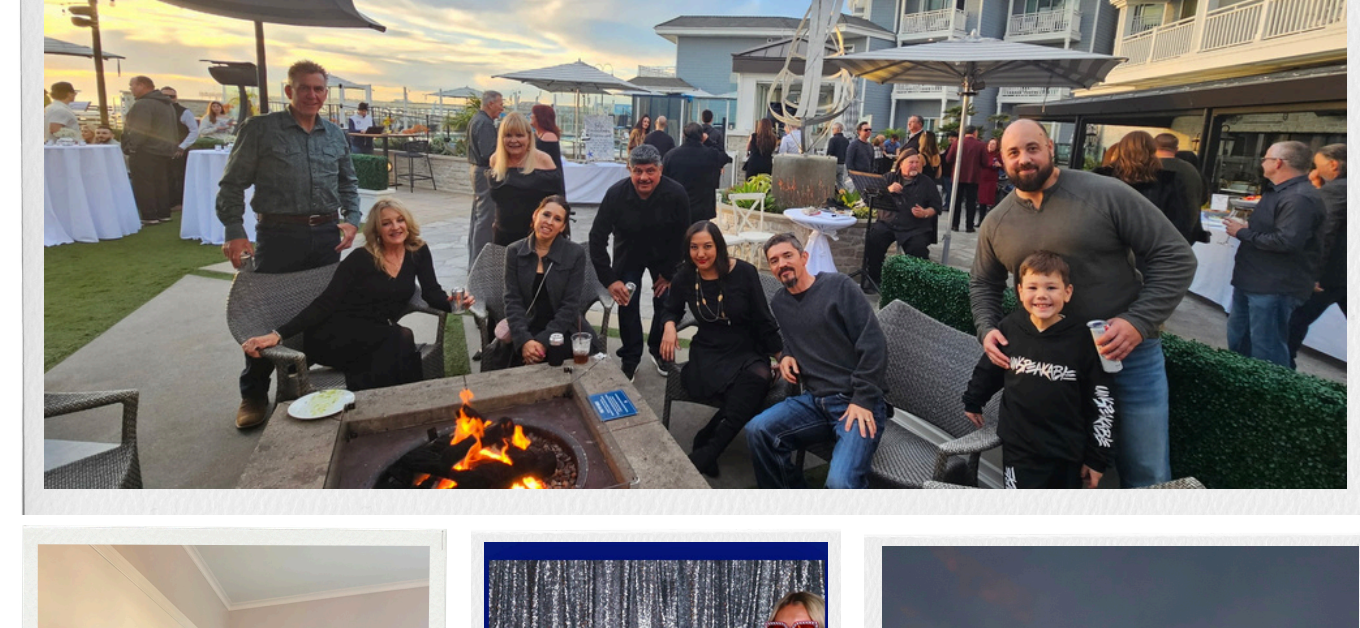
### Schedule a financial check-in

A periodic review meeting can help ensure your financial strategy stays aligned with your long-term objectives.

Spring cleaning doesn't have to stop at your home — it can also be a great opportunity to bring clarity and organization to your finances. If you would like help reviewing your financial plan or organizing your accounts, our team is always happy to schedule a time to connect.

## TD KICKOFF PARTY

The Thiesen Dueker team kicked off the year with our annual Presidents' Day weekend getaway, joined by our LPL partners and other partners. This year we gathered at Vespera Resort in Pismo Beach for a fun and relaxing few days on the coast. Spending time together outside the office is always something we value, and it's a great way to start the year as a team.



## HONORED TO BE NAMED BEST WEALTH MANAGEMENT

We are honored to share that Thiesen Dueker Modern Wealth Management has been named "Best Wealth Management" by CVLUX Magazine for the third year in a row.

Each year, CVLUX recognizes outstanding businesses across the Central Valley through its Luxury Awards, which celebrate organizations known for excellence, service, and community impact.

This recognition is especially meaningful to us because it reflects the trust and support of our clients and community. We are incredibly grateful for the relationships we've built and for the opportunity to continue serving families and businesses throughout the Central Valley.

You can learn more and see our feature in the March 2026 issue of CVLUX Magazine on pages 16–17.

Thank you to our clients for your continued confidence in our team.

## SPREADING JOY WITH THE RISE PROGRAM

Giving back to our community means a great deal to the Thiesen Dueker team, and we were grateful for the opportunity to once again support The RISE Program by donating teddy bears for elementary school students in Fresno. Through this special program, one of our valued clients visits classrooms to read The Teddy Bear Book to young students, and after the story is shared, each child receives a teddy bear of their own — a simple but meaningful gift that brings comfort, smiles, and a lasting memory.

## Don't Forget These Due Dates!!

### April 1

- Deadline to take 1st IRA Required Minimum Distribution (RMD) if you turned 73 in 2025

### April 15

- Individual 2025 1040 tax returns due or extension (Form 4868)
- C-Corp 2025 1120 tax returns due or extension (Form 7004)
- Estate & Trust 2025 1041 tax returns due or extension (Form 7004)
- 1st Quarter 2026 estimated tax payment due
- Contributions to HSAs due for 2025
- Contributions to 2025 Traditional, Roth & Coverdell IRAs are due
- Deadline to fund 2025 SEP IRA or Solo 401(k) for Sole-Props, unless extending

## Strawberry Ricotta Bruschetta

Total Time: 18 minutes

Servings: 12-16 pieces

### Ingredients

- 1 French baguette, sliced into ½-inch thick rounds
- 1 tablespoon olive oil
- 1 cup ricotta cheese (whole milk preferred)
- 1 cup fresh strawberries, chopped
- 1 tablespoon honey (optional)
- Salt and black pepper, to taste
- Fresh basil leaves, finely sliced (for garnish)
- Balsamic glaze, to drizzle on top

### Instructions

1. Preheat Oven: Preheat oven to 400°F (200°C). Arrange baguette slices on a baking sheet and brush with olive oil.
2. Toast Bread: Bake for 6–8 minutes, or until golden and crisp. Let cool slightly.
3. Mix Ricotta: In a small bowl, mix ricotta with salt, pepper, and optional honey. Stir until smooth and creamy.
4. Prep Strawberries: Wash and chop strawberries into small pieces. Set aside.
5. Assemble: Spread ricotta mixture onto each toasted baguette slice.
6. Add Toppings: Spoon chopped strawberries on top and drizzle with balsamic glaze.
7. Garnish & Serve: Top with fresh basil. Serve immediately.



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— Modern Wealth Management —

Contact your Thiesen Dueker team today

Contact