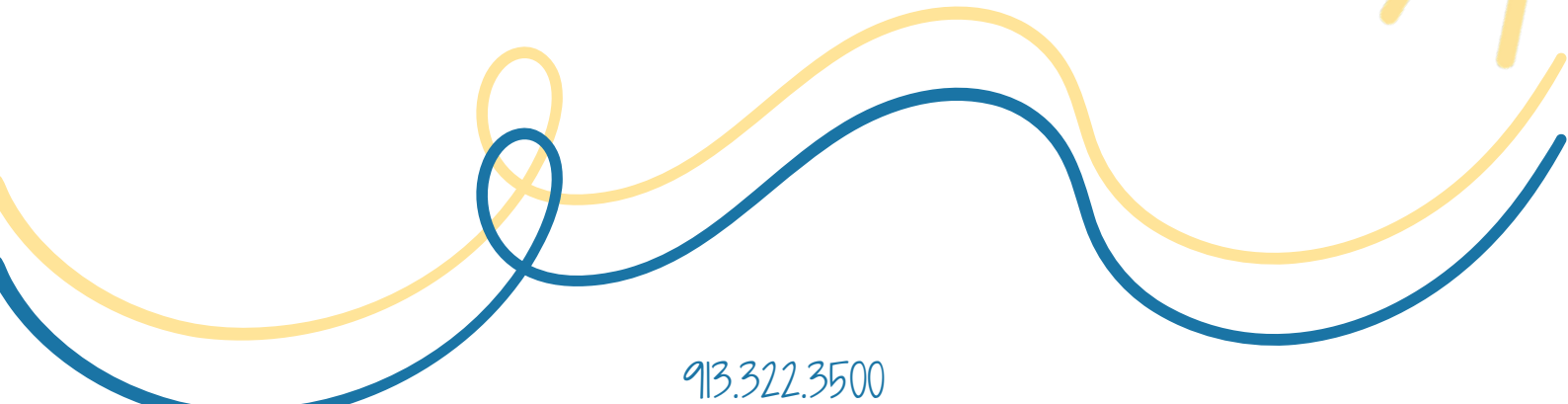




Summer

Newsletter



913.322.3500

17331 E US HWY 40, SUITE 101, INDEPENDENCE, MO 6450

5601 NE ANTIOCH RD, SUITE 8, GLADSTONE, MO 64119

7450 W 130TH STREET, SUITE 140, OVERLAND PARK, KS 66213

WWW.ASPIREWEALTHMGT.COM - INFO@ASPIREWEALTHMGT.COM



Summer

2026

As the sun shines brighter and the days grow longer, we at Aspire Wealth Management + Smart Tax would like to extend a warm welcome to the joys of summertime. This season is a perfect opportunity to relax, rejuvenate, and enjoy the vibrant moments that summer brings. We wish all of our valued clients a summer filled with fun, adventure, and cherished memories. Whether you're planning a getaway, exploring new hobbies, or simply soaking up the sun, we hope this summer brings you happiness and fulfillment. Thank you for being a part of our community, and here's to a wonderful season ahead!



Strawberry Pina Colada Punch



Ingredients

- 4 cups diced pineapple
- 2 cups strawberries, sliced
- ¼ cup frozen orange juice concentrate
- 1½ cups cream of coconut
- 1½ to 2 cups coconut rum
- 3-4 cups crushed or nugget ice
- Optional: splash of pineapple juice or club soda
- Garnish: pineapple wedges, strawberry slices, or cocktail umbrellas.

Preparation

- Prep the Fruit
- Blend the Tropical Base
- Add Ice and Blend Again
- Taste and Adjust
- Serve and Garnish
- ENJOY!



Welcome

New Faces

Aspire has been delighted to welcome some wonderful new faces to our team, each bringing their unique talents and energy to our community. We are thrilled to introduce Angela, Carolyn, Kelly, and Kyle as the latest additions to our Aspire family. Please join us in warmly welcoming these exceptional individuals as they embark on this journey with us!



Kyle Gilbert: Paraplanner/Service Representative

Kyle joined Aspire after a decade in the financial field -- with specialties in investing, insurance, sales, management, recruiting, financial planning, and entrepreneurship. He is passionate about helping clients achieve financial freedom and peace of mind through prudent planning, stewardship, and thinking outside the box. He is eager to continue helping the firm grow in order to have a greater impact on his beloved hometown of Kansas City. He and his wife, Keely, and kids Emmie (6) and Noah (3) enjoy traveling, trying new food and drinks, exploring Kansas City, pool time, church activities, spending time with friends and family, and cheering on our local sports teams.



Angela Lading: Client Service Coordinator

With over 20 years of experience in client relations and a lifelong history in the Kansas City metro, Angela combines professional excellence with local expertise. She is a dedicated grandmother to four, a proud "dog mom" to two senior Maltese pups, and an avid explorer of Kansas City's zoo, museums, and nature trails. Angela is passionate about serving her community and helping her clients reach their goals with integrity and a friendly, local touch.



Carolyn Lindsey: Tax + Accounting Professional

Former field biologist and dedicated animal advocate with more than 40 years of rescue experience, recently relocated to the Kansas City area with her dog, Daisy. Passionate about helping both people and animals, she volunteers with the Pet Resource Center of Kansas City (PRCKC) and has spent the past three years assisting clients with tax preparation and filing. She has experience supporting taxpayers across multiple states, is a commissioned notary, and is currently pursuing her Enrolled Agent (EA) credential to further expand her tax expertise. Known for her attention to detail, commitment to service, and ability to navigate complex tax situations, she enjoys helping clients gain confidence and clarity in their financial matters.



Kelly Petree: Tax + Accounting Professional

Kelly grew up on a farm near Tipton, MO, and earned a B.S. in Accounting with a minor in Equestrian Science from William Woods University. She brings 27 years of experience in payroll, bookkeeping, audits, taxes, and nonprofit work, with experience across public accounting firms, the State Auditor's Office, and the Office of State Courts Administrator, where she earned her Certified Court Manager designation. Outside of work, Kelly enjoys road trips, cross-stitching, knitting, cheering on her nieces at sporting events, and supporting her favorite teams--the Dallas Cowboys and St. Louis Cardinals. She also loves visiting Branson and Folly Beach, SC.

Mid-Year

Recap



Hello Summer!!

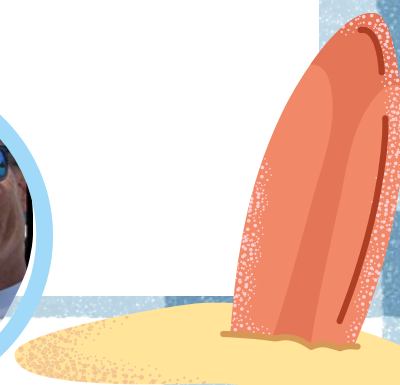
Schick Show has been busier then ever, and slowing down doesn't look to be on the agenda any time soon.

Maverick had a wonderful year of kindergarten, fortunately each day he was happy to go, and ready to learn. He's been busy playing on 2 soccer teams, and 1 baseball team. Maddison (Maddy) is truly all girl, if it's pink and sparkles she is wearing it! Thankfully she also loves going to school, and loves to keep the boys in line in her pre-k class. She has the gift of dance, music turns on and she moves, she will start dance class in June.

All work, no play makes for a grouchy Todd + Susan, so they have been blessed to have enjoyed a trip to Napa, and an upcoming trip to Munich, and then Rome. Majority of the upcoming summer is planned to spend quality time with the little Schicks, as it should be.

It's also Birthday season in our world, so lots of celebration, and cake. Maddison turned 4 on May 24, Maverick will turn 7 on June 12, and then we have another year around the sun for Susan (we stopped counting). We're in our 11th year, since May 22nd of marriage to one another, and still going strong on that.

Our little M+M's are the light of our world, along with our 10 year old mini-Goldendoodle, Mr. Bentley who is everyone's favorite. All in all, we are immensely blessed, and thankful each day! We sincerely appreciate the growing family of Aspire both clients and employees.



Local Fun

Summer Art Exhibit: Forest Forms

June 8, 2026 to September 30, 2026

Overland Park Arboretum + Botanical Gardens 8909 W 179th St Overland Park, KS
66013

Admission: \$7 for ages 18+, \$3 for ages 6-17, free for ages 5 + under

Girls' Night Out at Paint Glaze + Fire

June 19, 2026 5:30 PM - 8:00 PM

Paint Glaze + Fire 12683 Metcalf Ave. Overland Park, KS 66213

Admission \$20 minimum spend per person

Music Nights at The Arboretum: Amanda Hughey

June 25, 2026 5:00 PM - 7:00 PM

Overland Park Arboretum 8909 W 179th Street Overland Park, KS 66013

Regular Arboretum admission applies

FARMERS MARKET

20 E 5th St, Kansas City, MO 64106

SATURDAYS + SUNDAYS, APRIL - OCTOBER

9:00 A.M. - 3:00 P.M.

FREE ADMISSION

America 250 Parade + Block Party

Jul 4, 2026

101 E. Kansas St. Liberty, MO 64068

8:00AM-1:00PM

Worlds of Fun + Oceans of Fun

4545 Worlds of Fun Ave, Kansas City, MO 64161

Starting at \$44.99 online



Thank You

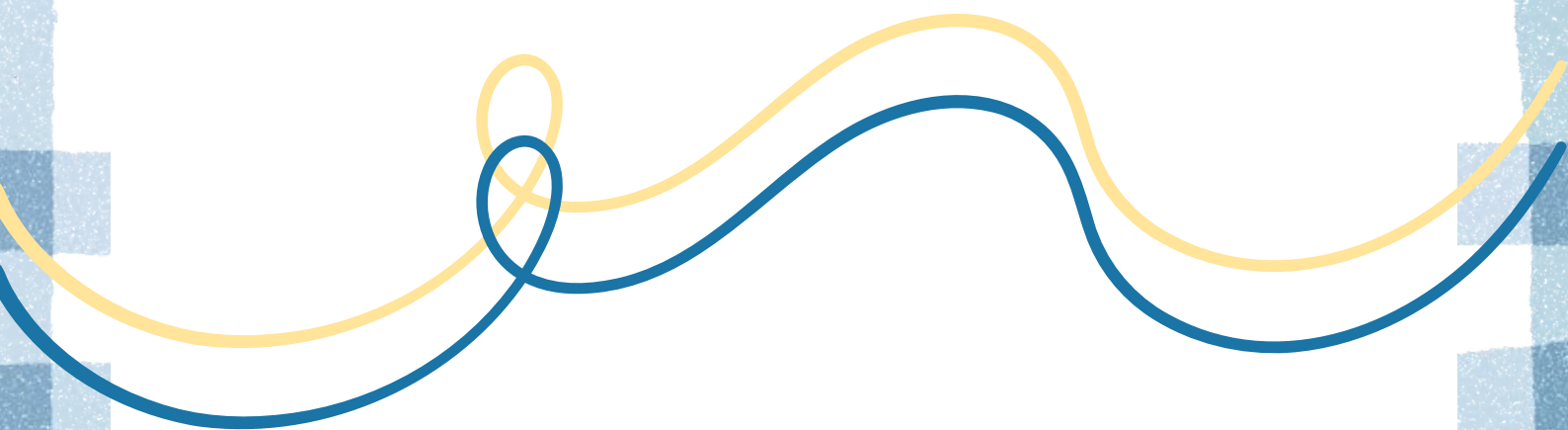
To our clients

We extend our heartfelt gratitude to all our clients here at Aspire Wealth Management + Smart Tax, both new and longstanding. Your support and trust have been invaluable this tax season, and we are incredibly grateful for each and every one of you. Thank you for choosing us to assist with your financial and tax needs, and for allowing us to be a part of your journey towards achieving your goals. We truly appreciate the opportunity to collaborate with you and to contribute to your success. As we move forward, we are committed to continuing to provide you with exceptional service, dedication, and excellence. Your confidence in us inspires us to innovate and improve continuously, ensuring that we meet your evolving needs. We look forward to building on our relationship and supporting you in your future endeavors. Thank you once again for being an integral part of our community.





SMART
TAX,LLC



913.322.3500

17331 E US HWY 40, SUITE 101, INDEPENDENCE, MO 6450

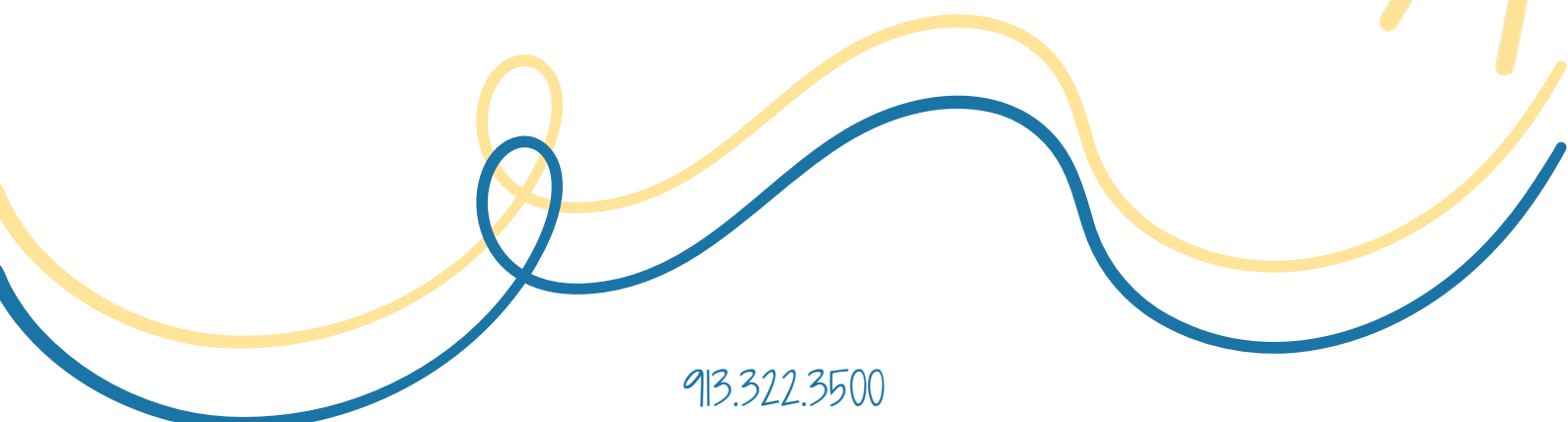
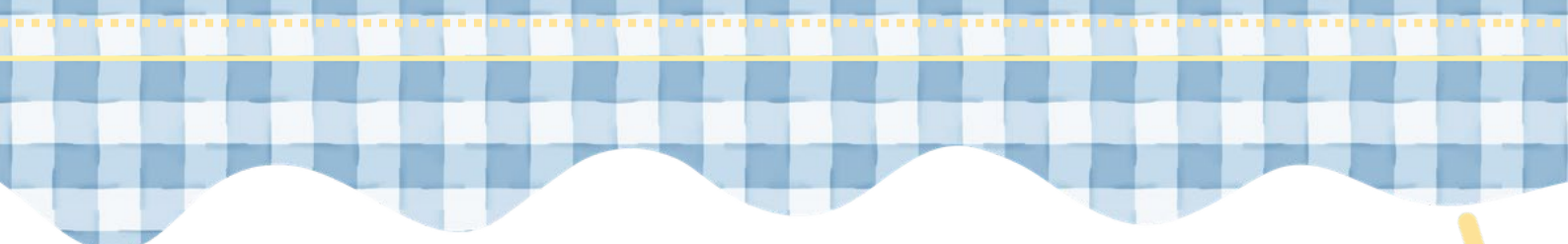
5601 NE ANTIOCH RD, SUITE 8, GLADSTONE, MO 64119

7450 W 130TH STREET, SUITE 140, OVERLAND PARK, KS 66213

WWW.ASPIREWEALTHMGT.COM - INFO@ASPIREWEALTHMGT.COM

Securities offered through CreativeOne Securities, LLC Member FINRA/SIPC. Advisory Services offered through Aspire Wealth Management, LLC a Registered Investment Advisor. Aspire Wealth Management, LLC and CreativeOne Securities, LLC are separate entities.





Summer

Newsletter

913.322.3500

17331 E US HWY 40, SUITE 101, INDEPENDENCE, MO 6450

5601 NE ANTIOCH RD, SUITE 8, GLADSTONE, MO 64119

7450 W 130TH STREET, SUITE 140, OVERLAND PARK, KS 66213

WWW.ASPIREWEALTHMGT.COM - INFO@ASPIREWEALTHMGT.COM

