



FALL
NEWSLETTER
2026


ASPIRE
WEALTH MANAGEMENT
& TAX CENTER



**SMART
TAX, LLC**



Hello, Fall!



HELLO, FALL!

PUMPKIN SPICE IS BACK, THE LEAVES ARE STARTING TO SHOW OFF, AND SOMEHOW WE'RE ALREADY TALKING ABOUT THE END OF THE YEAR! 🍁☕ WE HOPE YOU'RE ENJOYING ALL THE BEST PARTS OF FALL—COZY SWEATERS, FOOTBALL, FAMILY TIME, AND MAYBE A LITTLE TOO MUCH PUMPKIN-FLAVORED EVERYTHING.

SO GRAB YOUR FAVORITE FALL DRINK, GET COMFY, AND ENJOY! 🍁



🍁 Friendly Tax Reminder!

OCTOBER 15TH IS THE DEADLINE FOR THOSE WHO FILED A TAX EXTENSION. IF YOU HAVEN'T ALREADY, PLEASE BRING YOUR TAX DOCUMENTS TO OUR OFFICE SO WE CAN GET STARTED ON YOUR RETURN AND HELP YOU CROSS ONE MORE THING OFF YOUR FALL TO-DO LIST! 🍁

DON'T WAIT UNTIL THE LAST MINUTE—WE'RE HAPPY TO HELP!



📈 Market Update

THE MARKETS ARE ENDING AUGUST ON A POSITIVE NOTE! U.S. STOCKS MOVED HIGHER TODAY, WITH THE S&P 500 GAINING 0.7% AND THE NASDAQ JUMPING 1.6%, HELPED BY STRONG TECHNOLOGY EARNINGS—PARTICULARLY FROM NVIDIA. THE S&P 500 REMAINS NEAR RECORD HIGHS, WITH THE INDEX UP ABOUT 13% SO FAR IN 2026.



We've Added a New Leaf



Brandon Roarty - Service Representative

BRANDON ROARTY WAS BORN AND RAISED IN OMAHA, NEBRASKA, AND GRADUATED FROM THE UNIVERSITY OF NEBRASKA-LINCOLN WITH A DEGREE IN BUSINESS. WHILE

AT NEBRASKA, BRANDON WAS HEAVILY INVOLVED IN SOCCER, SERVING AS PRESIDENT OF THE MEN'S CLUB SOCCER TEAM, WORKING AS A PRACTICE PLAYER FOR THE WOMEN'S SOCCER TEAM, AND EVENTUALLY JOINING THE COACHING STAFF AS AN ASSISTANT COACH. HIS PASSION FOR COACHING CONTINUED AFTER COLLEGE, TAKING HIM ACROSS THE COUNTRY AND EVEN TO SCOTLAND, WHERE HE HAD THE OPPORTUNITY TO WORK WITH PLAYERS OF ALL AGES AND LEVELS.

IN 2024, BRANDON AND HIS FIANCÉE, LAUREN, MOVED TO KANSAS CITY TO START A NEW CHAPTER TOGETHER AND TO BE CLOSER TO FAMILY. THE TWO ARE GETTING MARRIED ON JULY 10, 2027, AND SHARE THEIR HOME WITH THEIR 4-YEAR-OLD BLACK LAB, LOUIE. OUTSIDE OF WORK, THEY ENJOY STAYING ACTIVE AND TAKING ADVANTAGE OF EVERYTHING KANSAS CITY HAS TO OFFER. WHETHER IT'S CATCHING A CONCERT, EXPLORING A FARMERS' MARKET, TRYING A NEW RESTAURANT OR BAR, OR SIMPLY FINDING SOMETHING NEW TO DO AROUND THE CITY, THEY LOVE GETTING OUT AND ENJOYING THEIR COMMUNITY TOGETHER.

BRANDON'S INTEREST IN THE FINANCIAL INDUSTRY BEGAN AS A HOBBY WHILE HE WAS IN COLLEGE, WHEN HE DEVELOPED A PASSION FOR INVESTING AND THE MARKETS. THAT INTEREST EVENTUALLY TURNED INTO A FIVE-YEAR CAREER ON THE TRADE DESK AT CHARLES SCHWAB, WHERE HE FOUND THAT ONE OF HIS FAVORITE

PARTS OF THE JOB WAS TAKING COMPLICATED TRADING AND INVESTMENT CONCEPTS AND MAKING THEM EASIER FOR OTHERS TO UNDERSTAND. THAT PASSION FOR EDUCATION AND HELPING PEOPLE FEEL MORE CONFIDENT WITH THEIR FINANCES IS WHAT HAS KEPT BRANDON IN THE FINANCIAL INDUSTRY AND CONTINUES TO DRIVE HIM IN HIS CAREER TODAY. HE IS EXCITED TO BRING THAT SAME PASSION FOR SIMPLIFYING THE COMPLEX AND BUILDING RELATIONSHIPS TO

HIS ROLE HERE AT ASPIRE.

Our Fall Bucket List

★ FALL EVENTS AROUND KANSAS CITY:

- **KANSAS CITY RENAISSANCE FESTIVAL** — SEPT. 5-OCT. 18, PLUS LABOR DAY AND OCT. 12, IN BONNER SPRINGS. COSTUMES, TURKEY LEGS, JOUSTING, ARTISANS, AND PLENTY OF "HUZZAH!"
- **GLOWILD: HIDDEN TREASURE** — BEGINNING IN SEPTEMBER AT THE KANSAS CITY ZOO & AQUARIUM. A NIGHTTIME LANTERN FESTIVAL THAT MAKES FOR A PARTICULARLY FUN FALL EVENING.
- **HALLOWEEN HAUNT AT WORLDS OF FUN** — STARTING SEPT. 19. FOR THOSE WHO PREFER THEIR FALL FUN WITH A LITTLE MORE SCREAM THAN PUMPKIN SPICE. 🎃
- **LOUISBURG CIDER MILL** — CIDERFEST, SEPT. 26-27 & OCT. 3-4. APPLE CIDER, CIDER DONUTS, FALL ACTIVITIES, MUSIC, AND CLASSIC HARVEST-SEASON VIBES.
- **5TH ANNUAL PUMPKIN FESTIVAL & BLOCK PARTY** - OCT 10 @ 8:00 AM - 12:00 PM. HISTORIC DOWNTOWN LIBERTY SQUARE 1 COURTHOUSE SQUARE, LIBERTY, MO, UNITED STATE. AT THIS SPECIAL MARKET DAY, ENJOY PUMPKIN SPICE AND EVERYTHING NICE WITH FALL FUN FOR THE WHOLE FAMILY, INCLUDING FREE ACTIVITIES!

★ FUN FALL EVENTS AROUND OVERLAND PARK:

- **PUMPKIN HOLLOW AT DEANNA ROSE CHILDREN'S FARMSTEAD** — SEPT. 22-OCT. 18. HAY PYRAMIDS, A GIANT SLIDE, A SPIDER-WEB MAZE, PUMPKINS, AND PLENTY OF OLD-FASHIONED FALL FUN.
- **BOURBON, BACON & BREWS** — OCT. 9. A BRAND-NEW OVERLAND PARK EVENT AT CLOCK TOWER LANDING FEATURING—YOU GUESSED IT—BOURBON, BACON, BREWS, LIVE MUSIC, AND PLENTY OF TASTING OPPORTUNITIES.
- **HAWKTOBERFEST AT BLUHAWK** — OCT. 10. A FAMILY-FRIENDLY AFTERNOON WITH HAYRIDES, FACE PAINTING, INFLATABLES, MAGIC SHOWS, A FOAM PARTY, LIVE MUSIC, AND MORE.
- **BOTANICAL BREWFEST** — OCT. 17. AN ADULTS-FOCUSED FALL EVENING AT THE OVERLAND PARK ARBORETUM WITH DRINKS, LIVE MUSIC, YARD GAMES, AND BEAUTIFUL FALL SCENERY.
- **NIGHT OF THE LIVING FARM** - OCT 16-17 & 23-24 - DEANNE ROSE CHILDRENS FARMSTEAD. 5:30PM - 9:00PM. PARTICIPATE IN MAD SCIENCE EXPERIMENTS, A FLASHLIGHT SCAVENGER HUNT, PRINCESS DANCES, FORTUNE TELLER READINGS AND TOP IT ALL OFF WITH A MARSHMALLOW ROAST. DON'T FORGET TO PACK A COSTUME!



Fall For Aspire

FALL INTO FINANCIAL PLANNING

AS THE LEAVES BEGIN TO CHANGE AND THE YEAR STARTS WINDING DOWN, FALL IS A GREAT TIME TO TAKE A FRESH LOOK AT YOUR FINANCIAL PICTURE. AT ASPIRE WEALTH MANAGEMENT & TAX CENTER, WE BELIEVE PROACTIVE PLANNING CAN MAKE ALL THE DIFFERENCE—WHETHER YOU'RE PREPARING FOR YEAR-END TAXES, REVIEWING YOUR INVESTMENTS, PLANNING FOR RETIREMENT, OR SIMPLY MAKING SURE YOUR FINANCIAL STRATEGY IS STILL ALIGNED WITH YOUR GOALS. AS WE HEAD INTO THE FINAL MONTHS OF THE YEAR, WE ENCOURAGE YOU TO TAKE A MOMENT TO REFLECT ON WHERE YOU ARE TODAY AND WHERE YOU ASPIRE TO BE TOMORROW. OUR TEAM IS HERE TO HELP YOU MAKE INFORMED DECISIONS AND APPROACH THE SEASON—AND THE YEAR AHEAD—WITH CONFIDENCE. HERE'S TO A STRONG FINISH TO THE YEAR AND AN EVEN BRIGHTER FUTURE!



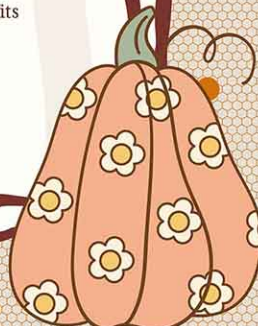
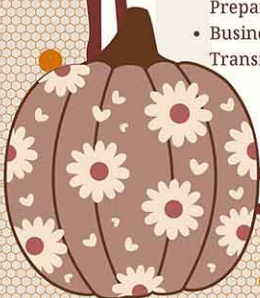
Tax Center

- Income Tax Filing
- Accounting
- Payroll
- Bookkeeping
- Financial Statement Preparation
- Business Transition Support
- Payroll Processing & Reporting
- Tax Planning
- Tax Filing Services
- Tax Withholding
- Wage Garnishment
- Compliance Support



Wealth Management

- Financial and Wealth Planning
- Investment Management
- Legacy Planning
- Retirement Income Planning
- Insurance
- Tax Strategies
- Social Security Maximization
- Workplace Benefits





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