



TPF TIPS – JULY, 2026

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Welcome to the new-look TPF TIPS monthly newsletter, where our mission is to *apply 35 years of experience to cut through the noise, unpack the jargon, and offer clear, digestible insights on the tax and financial topics that matter most to you.*

And...provide an inside look to some of our favorite anecdotes from our years as a company in the new, **35th Anniversary – Did You Know??** section of the newsletter.

Here we will share insider stories, successes and lessons learned in serving generations of clients. Hope you enjoy this special look into our history.

We know your time is precious and your inbox is sacred. We strive to make these emails a quick, valuable read (5–7 minutes) and plan to deliver them to you on or around the 15th of each month (a not-so-subliminal nod to that important day in tax season).

After all, **it's your money—we want to help you keep as much of it as possible!**

35th Anniversary – Did You Know?!

SAVE THE DATE – THURSDAY, AUGUST 13, 2026.

Our annual Client Appreciation Event marks a milestone in service to clients and community: 35 years – and in the same location no less! At least we know nothing has ever been lost or misplaced during a move!

We are asking everyone to join us at one of our favorite venues:

Honor Café in Conroe

103 North Thompson Street, Conroe, Texas 77301

6pm-8pm

Heavy hors d'oeuvres, deserts, soft drinks will be served, beer and wine will be available.

The event allows us to say “thank you” and show our appreciation in person!

Bring a friend – the more the merrier!

It's that time.....buckle up and let's get **savvy!!!**

The theme for this month is:

July 2026 – 250 Years of Freedom, Gratitude and Opportunity!

As we step into the heat and humidity of another Texas summer, we find ourselves standing at a remarkable, historic crossroads.

This is not just another month of typical backyard barbecues, cold watermelon, and neighborhood fireworks; it is the month of our nation's Semiquincentennial or, 250th birthday.

This incredible milestone invites us to look back with deep appreciation and to look forward with unshakeable optimism. It is the perfect moment to reflect on the incredible blessings this country offers and the remarkable individuals who built it, defended it, and continue to keep it great.

The Symbol of Freedom: The Red, White and Blue

When we look at the American flag, we see more than just fabric and dye; we see a symbol of freedom whose colors hold profound meaning.

Red represents **valor** and **courage** – the strength to persevere even when the outcome is uncertain.

White signifies **purity** and **integrity** – the high ideals that call us to act with honor, even when it is inconvenient.

Blue stands for **vigilance**, **perseverance**, and **justice** – the steady resolve that drives our nation forward.

In a world that can feel noisy and divided, the American flag remains a powerful beacon of possibility and unity. It reminds us: ***Yes, you can dream big here. Yes, you can build something here. Yes, you can accomplish anything here.***

Ongoing Gratitude

We owe a heartfelt debt of gratitude to the founders, first responders, law enforcement, entrepreneurs, teachers, service members, factory workers, farmers, and the everyday dreamers across generations who have poured their energy, effort, ideas, and love into this land.

From the Revolutionary War patriots to the Greatest Generation, from civil rights leaders to modern innovators — their collective courage created the greatest framework of opportunity the world has ever known.

And yes, that includes the freedom to pursue financial independence, to build businesses, to provide for your family, and to give back generously. That is the amazing American promise we are privileged to live every day.

Small Steps, Monumental Impact

One of the most inspiring things about our 250-year history is how small, persistent actions by ordinary people create such extraordinary results. A single inventor tinkering in a garage. A family saving diligently for the next generation. A business owner navigating taxes and payroll so they can hire more local talent.

These small acts, these daily efforts, have significant impact for family, community, and the country as a whole.

If you have ever had a year where you said, *"How did we make it through that?"* you already understand what gratitude does. It turns survival into appreciation—and appreciation into smarter decisions.

That is why we love what we do.

Behind every tax return, financial statement and consultation are real stories of ambition, resilience, and quiet heroism.

Opportunity – The Patriotic Pursuit

Freedom and gratitude set the direction. Opportunity supplies the momentum.

As we head into the second half of 2026, we encourage everyone to take a "mid-year check." With the financial landscape being shaped by new legislation, investment opportunities and developing technologies; making smart moves now can prevent surprises later at tax time in April.

TPF Tips to Consider:

- **Maximize the Basics:** Maxing out IRAs and 401(k)s remains one of the most effective ways to build security while reducing taxable income.
- **Business Strategy:** If you operate a business, mid-year is prime time for strategic moves regarding depreciation, asset acquisition and research & development expenses.
- **Plan with Purpose and Generosity:** Whether it is charitable giving that aligns with your values or adjusting your tax game plan, operational clarity is always your greatest asset.
- **Organize Like a Pro:** When your information is organized, you make better decisions – and, you reduce the time spent scrambling later.

Final Thoughts. . .

Anniversaries do not just remind us where we have been – they connect us to where we are going. We are grateful for the trust you place in *The Pierson Firm* and honored to be part of your story in a meaningful way.

We invite you to make one intentional move this month:

Take a mid-year check. Review where you are. Align your actions with your goals.

In short, protect the opportunity you have worked so hard for.

When freedom meets gratitude and opportunity (paired with wise tax planning) it does not just improve a number on a page, it strengthens the future you are working to create. And, after all; we want to *help you keep as much of your money as possible.*

May God continue to bless the United States of America!

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About The Pierson Firm

Conroe-based The Pierson Firm offers a comprehensive range of tax-related services to individuals and businesses alike; and have been doing so for over 35 years. From Tax Planning, Preparation & Representation to Business Operations, Advisory and Compliance, the firm provides personalized solutions to those around the block or around the globe. Additional company information can be found by visiting www.thepiersonfirm.com.



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