

## Client Access Updates

2019 brought on many updates and improvements to Client Access - and there's more in store for 2020! [Click here](#) to read more about the enhancements to the Summary Page, Available Cash Display, Reporting, and Enhanced Authentication.

## 'Tis the Season for Charitable Giving

Charitable giving can be one of the most satisfying aspects of a financial plan. Not only do you enjoy its feel-good aspect, but your taxes may benefit and a charity that is furthering your cause gets the resources it needs. [Click here to learn how you can make sure your chosen charity is doing what it says it'll do with your donations.](#)



*"You'll thank me when Utilities are the only thing keeping your portfolio afloat."*

## Lower Your Taxable Income by Gifting to Charity

The Qualified Charitable Distribution (QCD) is a powerful tool for those looking to achieve philanthropic goals and receive a tax break at the same time. If you are 70 1/2 or older and wish to gift funds to a charity, a QCD may be the right tool for you.

[Read on](#) for more information about how a QCD may help you. This blog post will also share who is [eligible to make a QCD](#), explore [qualifying rules](#), and briefly discuss [how taxes are filed with a QCD](#).

## Kaydan Cares: One Warm Coat Recap

Thank you to everyone who participated in our [6th Annual One Warm Coat Drive!](#)

We feel so fortunate to be surrounded by such thoughtful and generous people like you who help us make an impact in our local community year after year. [Click here to find out how many coats we collected and donated this year.](#)



## Congratulations Are In Order!

Congratulations to [Jim Kruzan](#), CFP®, CRPC® for being named to Raymond James Chairman's Council for 2020. This marks Jim's 18th consecutive year of this notable recognition.

This achievement would not have been made possible without our clients continued trust and confidence, and the dedicated



team at Kaydan Wealth Management.

[Read more about the recognition here.](#)

Membership for Raymond James Chairman's Council is based on prior fiscal year production. Re-qualification is required annually. The ranking may not be representative of any one client's experience, is not an endorsement, and is not indicative of an advisor's future performance. No fee is paid in exchange for this award/rating.

## Trending Team Member News



### Happy Anniversary, Jen!

December marks [Jen](#) Verscheure's one year anniversary with Kaydan Wealth Management. Jen joined Kaydan Wealth in 2018 as an Assistant Wealth Planner, joining Jim Kruzan in all of his meetings. Jen's primary role is to help prep for Jim's meetings, take detailed notes during meetings, and help expedite all meeting follow-up actions. If you've had the pleasure of meeting Jen this year, I'm sure it's easy for you to see how lucky we are to have her as the newest member of the Kaydan Wealth family.

*Happy Anniversary, Jen! We look forward to many many more with you.*

*Wishing you and your family a very merry holiday season and happy new year!  
Sincerely, [Jen Verscheure](#)*



### Learning the Value of Giving

As my children were growing up, they were always a part of the Christmas shopping we did for a family that we adopted through our church. As young boys, they were not as interested at the time as I'd hoped for. It was important to me that they knew the importance of thinking of others, especially during the holidays.

Well, they never cease to amaze me! It has been several years since they have shopped with me but I recently received a text from my son (that now has a real job and real financial responsibilities) asking if I still adopt a family, as he would like to adopt his own. I guess he was listening more than I realized!

*Happy Holidays! - [Colette Kline](#)*



### Mimi of Two!



### On the News Stand

There's no news like baby news! Our very own [Shawn Reszczyk](#) is looking forward to being a Mimi of two this coming summer. Shawn's daughter, Amanda, and her husband, Justin, and their excited soon-to-be big sister, Raleigh, will be welcoming baby number two in June 2020.

Best wishes for a healthy pregnancy, Amanda! *We can't wait for baby snuggles.*

Have you found yourself skimming through magazines in the checkout line recently? There's a chance you may have flipped past one of [Evan Lian](#)'s cartoons! You can find his work in November's issue of Reader's Digest, The New Yorker, and, inexplicably, Vogue Korea.

*Congratulations Evan!*



## The Gift of Gratitude

During the holidays, I believe it's an enhanced time of giving and reflection for so many, including myself. Every year, my family is honored and blessed to volunteer our time at our church assembling and delivering holiday food baskets to local families who would otherwise not have a meal. I cannot put into words the joy I feel giving back to our community. It's priceless to see their sweet faces light up with gratitude. They may never know the gift they have given or how they have impacted *my life!* Just imagining how different this world would be if we lived each day giving thanks for what we do have, instead of the things we do not.

*Happy Holidays! - [Heidi Hawley](#)*



## A Special Holiday Wish

We hope you know that you are so much more than just “clients.” You are part of our extended “Kaydan Family and Cherished Friends.” It may sound like a cliché, but you really do mean everything to us. We truly enjoy our conversations, and sharing life experiences with you. Together, we’ve laughed, cried, and faced countless milestones, celebrations, and hard times. We truly have such an amazing group of people (you!) to serve and we are *so thankful* for the opportunity! Seriously, I say this all of the time! I hope each and every one of you can experience some of the peace, joy, and love that comes at Christmas time, or whatever Holiday you may celebrate. If this is a difficult time for you, I wish you even more joy and comfort. Please know that you are not alone. We sincerely care about you. Wishing you all a very Merry Christmas & a Happy New Year! *Warm Regards, [Shawn Reszczyk](#)*

## Reminder!



Known as “the most wonderful time of the year,” the holidays see many of us slowing down.

As we relish the last few days of 2019 with our family and friends, **our offices will be closed to observe New Years Day (January 1st).**

Please [click here for complete details](#) and more information about how to access your account(s) online when our office is closed.

*Merry Christmas and Happy New Year!*