



# Quarterly Newsletter

February 2026



## WHAT WE'RE THINKING

### Time for an Insurance Review?

Insurance is an essential part of your financial plan, yet it's one area that often needs revisiting as life and priorities change. With Bryan joining our team as Director of Insurance Solutions, we're enhancing how we help clients use insurance strategically to help mitigate risk as part of a coordinated, holistic plan, including:

- Long-term care planning
- Estate and tax planning strategies
- Buy-sell planning for business owners
- Disability insurance for professionals
- Life insurance beyond employer-provided coverage

If it's been a while since your insurance was reviewed, this may be a good time to revisit it. Working alongside the advisor team, Bryan helps integrate insurance planning into a coordinated strategy focused on protecting and advancing your long-term goals.

We invite you to schedule time with Bryan to review your insurance strategy.

[Book Your Insurance Review](#)

## INSIDE THIS ISSUE

### READING

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Contribution Limits

### WATCHING

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### DOING

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## 2026 Retirement Contribution Limits



Contribution limits for many retirement plans are rising in 2026, reflecting inflation adjustments and ongoing SECURE Act 2.0 updates. Review the amounts that you can contribute to your retirement plans this year.

[Review Contribution Limits](#)

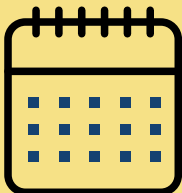
## Gifting is a Family Affair



Charitable giving can be a meaningful way to strengthen family bonds. Involving loved ones in philanthropic decisions can deepen shared values and offer lasting impact for both your family and the causes you care about.

[Read the article](#)

## Important Dates to Keep on Your Radar



- March 8** – Daylight Saving Time starts
- March 16** – S-Corporation and Partnership tax filing deadline
- April 3** – Good Friday (Office is closed)
- April 5** – Easter
- April 15** – Federal tax filing deadline
- April 15** – Prior-year IRA and HSA contribution deadline

## Welcome Bryan, Cal, Cassidy & Tori

Each brings added experience and support that strengthens our ability to serve you—from more closely aligned insurance strategies, to enhanced operational support, to clear and thoughtful communication designed to keep you informed and confident at every stage of your financial journey.



**Bryan Scott**

Director of  
Insurance Solutions



**Cal Ketcham**

Senior Client  
Service Associate



**Cassidy Hornberger**

Director of  
Marketing



**Tori Saxon**

Client Service  
Associate

### Congratulations, Denise!

We are excited to share that **Denise Pomplun** has been promoted to Senior Client Service Associate. Denise's leadership, initiative, and thoughtful problem-solving continue to elevate the service we provide to our clients. Please join us in congratulating Denise on this well-earned achievement.

### Growing to Better Serve You

Our team continues to invest in education and professional development through opportunities with Raymond James. This quarter, **Heather** attended the 2026 Retirement Plan RIAC Conference, **Elizabeth** participated in Tech Connect sessions, **Sarah** attended the ICD Western Practice Management Expo, and **Bill** joined the Alternative Investments Summit, learning about private equity opportunities. Each brought back insights that strengthen our support for you.

# The Manning Foundation

The Coronado community recently celebrated the debut of the newly named Manning Gymnasium at Coronado High School, made possible by a generous gift from Michael and Nancy Manning. The dedication reflects a shared commitment to supporting local students and strengthening educational opportunities in Coronado.

[Read more...](#)



## WHAT WE'RE LIKING

### Favorite Restaurants

As we continue to grow to better serve you with a more holistic, team-based approach, we thought it may be fun to share a bit more about each of us.

**Bill:** [Garage Buona Forcetta](#) (Coronado)

**Brittany:** [Tavern](#) (Coronado)

**Bryan:** [Il Posto Accanto](#) (NYC)

**Cal:** [Jake's Del Mar](#) (Del Mar)

**Cammy:** [Caló Kitchen+Tequila](#) (Laguna Niguel)

**Cassidy:** [Poseidon on the Beach](#) (Del Mar)

**Denise:** [Donna Jean](#) (North Park)

**Elizabeth:** [Zzan Downtown](#) (San Diego)

**Heather:** [El Pescador Fish Market](#) (La Jolla)

**Hope:** [Buona Forcetta](#) (Newport Beach)

**Jen:** [Osteria Cotto e Mangiato](#) (Cortez Hill)

**Jordan:** [Bronx Pizza](#) (Hillcrest)

**Michael:** [Serea Coastal Cuisine](#) (Coronado)

**Richard:** [Baci Ristorante](#) (San Diego)

**Roger:** [Snake River Grill](#) (Jackson, WY)

**Sarah:** [Lilian's](#) (Rancho Santa Fe)

**Tina:** [Callie](#) (San Diego)

**Tori:** [Brigantine](#) (Del Mar)

**We'd love to hear from you!** Email [hello@themanningcompanies.com](mailto:hello@themanningcompanies.com) and tell us your favorite restaurant. We'll share some fellow clients' recommendations in the next newsletter.

**Know someone who could benefit from a thoughtful financial conversation?**

We'd be honored to help. You're welcome to [introduce us directly](#), or simply pass this newsletter along.



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