

Congrats Erin!



Our very own Erin Watkins graduated in December of 2023 from CSU (Go Rams!) with her M.B.A. She shocked us all by completing her program in three years and was in the top of her class. She helped the College of Business by being a mentor to undergraduate students and learned many topics from old to new (COVID). She is excited to bring this new wealth of knowledge to 56 Capital Partners and hopes to improve business processes. Erin traveled up to Fort Collins for the commencement and celebrated with her family (her mom and sister surprised her all the way from Georgia). She appreciates all the support from clients encouraging her along the way!



Welcome Elizabeth Schlitter!!

Please give a warm welcome to the newest team member Elizabeth! Most of you have already met or had an interaction with Elizabeth but if not make sure to save her email Elizabeth@56capitalpartners.com. Elizabeth grew up in New Hampshire, where she spent most of her childhood. She moved to Colorado shortly after graduating from James Madison University with a B.A. in Philosophy and Religion. Although she has lived in Colorado Springs most of her adult life, Elizabeth wishes Colorado had beaches instead of mountains. In her free time, Elizabeth enjoys scrap-booking as well as spending time with her husband and rescue dogs. Elizabeth graduated from Colorado Christian with her M.B.A. and has over nine years of experience in the financial industry.

Best of The Springs 2024

You have helped us once again and we are so humbled and excited to be your Best of the Springs Financial Planner! Thank you to our amazing clients who voted us into this spot. We are excited to continue to offer our services to this amazing community.

Tax Forms

April 15th is almost here! If you have not already filed and need your tax documents from us please follow these steps to obtain those.

Navigating to the Tax Documents
Once you are logged into your 56 Capital Partners account follow these steps:

- Navigate to the header of Performance & Reports
- From the drop-down menu select Tax Documents
- The tax year 2023 auto-populates in the drop-down and then you can download the forms you need.
- *If you have more than one account be sure to select the blue bubble with your account number in it to Add/Edit accounts and collect documents for all accounts.
- *If your account was closed but you need to obtain documents follow the blue bubble instructions and click the filter button top right by the gear, Account Status, and select Closed and Apply.

Questions or need help please contact Elizabeth at Elizabeth@56capitalpartners.com or Erin at Erin@56capitalpartners.com!

Important Dates

05/26/2024:

Memorial Day
56 CP Closed

06/19/2024:

Juneteenth
56 CP Closed

07/03/2024:

4th of July
56 CP Closed after
11:00 am

07/04/2024:

4th of July
56 CP Closed

09/02/2024:

Labor Day
56 CP Closed

10/14/2024:

Columbus Day
56 CP Closed

Please be sure to note all of our closures for the next six months. We will post those on social media as well in case you cannot find this report!

Office Updates

Add our emails to your address book so we don't land in spam!

We do have a mail drop box outside our new suite if you are needing to bring us documents outside of normal business hours.

Don't forget to check out all the resources we have available to you on our website and social media!



We Want To Hear From You!

We love our culture at 56 Capital Partners and part of that culture is team outings that allows us to build connections and bond so we can make the client experience better. We are welcoming suggestions from our amazing clients and want to hear some ideas of what our next outing should be! Email those over to Erin@56capitalpartners.com.

Thank you!

Reading List

If you have not checked out the reading list from last year make sure to stop on by the website. There are some great books and we hope that you will find one that you will love!

Spring is in The Air!

Spring cleaning is a great way to get ahead with your to-do list you have been putting off. The days are longer and now is the time to get some things done. Here are some things we recommend reviewing annually. Make this a habit by adding it on your calendar so you can have a routine Spring Clean Up every year!

- Pull your annual free credit report
- Take pictures and videos of the house with items
- Update estate planning documents as needed
- Review discount options (annual pay or adjusting coverage)
- Assess financial goals: did you complete any, do we need new ones?
- Review tax return and make adjustments