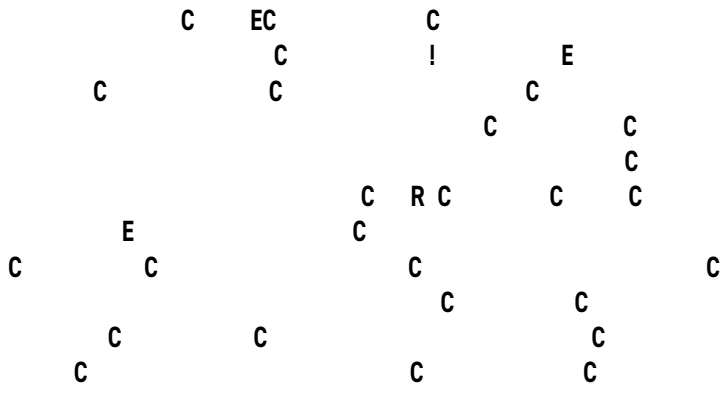


## Congrats Erin!



### Key

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

## 56 Capital Partners has an opening for Financial Operations Associate!

Finding the right team member to add to 56 Capital Partners is challenging. There are numerous

## Hourly Fee Changes

56 Capital Partners performs a number of services for our client base which consumes a large chunk of our time. We help with tax preparation, estate planning review, succession planning, business consulting, real estate consulting and so much more. We have realized that those services have a cost of time being taken away from taking care of you in the capacity we would like. In order to keep our concierge service levels high, we will begin charging hourly fees for certain services that take away time from our day to day operations.

## Account Edits!

We are able to help you make edits to your IB accounts now. If you need to update your address, trading permissions etc. we can initiate on our end and IB will send you a text message SMS to login and approve the edit. This is a great feature and we hope it helps make dealing with the platform easier! Whose excited?

## Tax or s

! C C ! If you have not already filed a 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:  
avigate 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.

uestions 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!**

**Be on the lookout in January for our annual reading list we have compiled and our read of the year!**

### U

**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!**

