NELSONCORP NEWS

AUGUST
2026

CARING FOR ELDERLY PARENTS

Practical guidance and heartfelt insights on navigating the challenges of caregiving. p5

Q2 MARKET RECAP

Markets vs. the Economy: A look at why strong stock market performance and a weaker economy can tell very different stories. p6

FEATURED CHARITY OF THE MONTH

NelsonCorp's Charity of the Month Supports White Oaks Therapeutic Equestrian Center. p11

YOUR NELSONCORP TEAM


DAVID NELSON


EUGENE KRUEGER


VALERIE HILL


AMY CAVANAUGH


KENNETH NELSON


JACOB WOODCOCK


NATE KREINBRINK


JAMES NELSON


JOHN NELSON


ANDY FERGURSON


JAMIE HUGUNIN


MICHELLE EVERSOLL


AUSTIN ECK


TRAVIS MOREHEAD


MIKE VANZUIDEN


AMANDA SCHAVER


TABATHA WESTPHAL


MIKE STEIGERWALD


HANNAH VAN HYFTE


ISABEL HANSEN


MICHELLE GOODWIN


KAELYN GOODSMAN

IT'S BACK-TO-SCHOOL SEASON

All around the country, kids will be donning their backpacks and heading off to learn about geology, geography, music, math, and everything in between.
But there's something most kids don't learn in school.

Financial skills.

I remember an article I read some time ago about which financial terms kids should learn by a specific age. Obviously, every kid is different, but I think the recommendations made in the article are a good starting point:

1. Saving (age 4+)
2. Budget; Loan; Debt (age 8)
3. Interest; Credit (age 8-10)
4. Taxes; Investment (age 10-12)
5. Stock (age 12+)
6. 401k (age 14+)
7. Credit Score (age 15+)

When kids learn terms like these, something truly magical happens: They start to understand why Mom says, no, they can't buy that thing— it's not part of their budget.

They start to think about how finance impacts their own lives. How if they save for a few weeks or months, they can buy that game they wanted. How if they put some of their money in the bank, they get a letter every year showing what they earned in interest.

Here at NelsonCorp, we're always thrilled when clients come in with kids/grandkids or ask us to explain something to them. Our mission is to help everyone we know feel comfortable with money and confident about their financial future...and by helping young people early on, we can ensure the next generation feels very confident indeed.

Sincerely,

David Nelson

CONTENTS

THINGS TO NOTE

It's almost time for Medicare open enrollment. We are happy to review your Medicare policies to see if there are better options available. Call the office to schedule time with one of our Medicare specialists.

2026 annual enrollment period is October 15 - December 7.

SUPPORT OUR LOCAL CHARITIES & BUSINESSES

Check out what's happening at our area charities, businesses, and communities:

- Paint it Back Festival, Clinton, IA
- DeWitt Farmers Market, DeWitt, IA
- Visit Clinton www.GrowClinton.com
- Visit Quad Cities www.visitquadcities.com

NelsonCorp Nuggets

Missing your initial enrollment period for Medicare coverage when you turn 65 can result in permanent late-enrollment penalties, unless you are covered by an eligible and active employer plan.

(source: https://www.aarp.org/medicare/what-to-know-about-medicare)

THE TIME OF MY LIFE

August 21 marks National Senior Citizens Day, a time to honor the contributions, accomplishments, and lasting impact of older adults. From sharing knowledge and traditions to strengthening our communities through volunteerism and leadership, seniors play an important role in enriching the lives of those around them.

If you spend enough time talking with them, senior citizens may remind you how much the world has changed, sometimes for the better and sometimes not. And while younger generations occasionally blame seniors for some of those changes, one older friend of mine recently offered a spirited defense of his generation. He grumbled in a half-joking tone this thought:

"It was not senior citizens who took the melody out of music, the pride out of appearance, the courtesy out of driving, the romance out of love, the commitment out of marriage, the responsibility out of parenthood, the togetherness out of family, the learning out of education, the service out of patriotism, the Golden Rule from rulers, the civility out of behavior, the refinement out of language, the dedication out of employment, the prudence out of spending or the ambition out of achievement. And we are certainly not the ones who eliminated patience and tolerance from personal relationships and interactions with others!

"I am a senior citizen.

"I'm the life of the party, even if it lasts until 8 pm. I'm very good at telling stories: over and over and over. I know other people's grandchildren aren't nearly as cute as mine.

"I'm not really grouchy. I just don't like traffic, waiting, crowds, loud music, unruly kids, barking dogs, lawyers, politicians and a few other things I can't seem to remember right now. I'm a walking storeroom of facts-I've just lost the key to the storeroom door.

"I'm beginning to realize that aging is not for wimps. I'm sure they are making adults much younger these days ... and when did they let kids become policemen?

"Yes, I am a senior citizen, and I think I'm having the time of my life!"

There is something worth remembering as we celebrate National Senior Citizens Day: growing older is not merely a matter of accumulating birthdays. It is a matter of accumulating experiences, lessons, victories, disappointments, friendships and wisdom that cannot be found in textbooks or online search.

Seniors have witnessed remarkable changes during their lifetimes. Many grew up without computers, cell phones, GPS navigation or instant access to information. They have seen men walk on the moon, watched technology transform communication, and experienced social and cultural changes that younger generations often take for granted. Through it all, they adapted, learned and kept moving forward.

Perhaps that is why seniors often possess a perspective that can only come from living through both good times and difficult ones. They know that challenges come and go. They understand that most problems eventually find solutions. They have learned that patience, perseverance and common sense are often more valuable than panic and outrage.

They also continue to make meaningful contributions every day. Many volunteer in schools, churches, hospitals and community organizations. Others care for spouses, assist adult children or help raise grandchildren. Some continue working well past traditional retirement age, while others devote their time to mentoring younger people and sharing skills that might otherwise be lost.

And let's be honest—seniors deserve a little credit simply for keeping up with modern technology. Anyone who has successfully navigated online banking, streaming television, smartphone updates and passwords containing fourteen characters, one uppercase letter, two symbols and a hieroglyphic (okay maybe not the last one) has demonstrated both courage and determination.

The truth is that every generation leaves its mark on the world. The men and women we celebrate on National Senior Citizens Day helped build the communities, institutions and opportunities we enjoy today. Their stories, humor, resilience and wisdom remain valuable gifts, reminding us that age is not simply a number—it is a lifetime of experience worth honoring.

Time marches on for all of us. Make the most of what you've got and never underestimate the power and importance of the "senior" generation.

CARING FOR ELDERLY PARENTS

Having worked with many clients who are caring for elderly parents, and having gone through it myself with my siblings, I'm always struck by the change in relationship an aging parent can bring. After all, these are the people who raised you, who made sure you were fed and cleaned, who comforted you when you were sick or hurt—and now that script is flipped as you, the adult child, are now looking out for your parents' needs. This experience can be a rewarding one, but it can also be difficult emotionally, physically, and mentally. When that happens, it's easy to feel overwhelmed and alone.

While people are living longer and healthier than ever these days, that also means more people than ever are needing care longer and later. More than 37 million adults were giving care to a parent or older relative in 2023, and the need hasn't shrunk. Being one of those millions means you're in good company, but it doesn't make the job any easier. Whether your caregiving means dropping in once a week or moving Mom into your spare bedroom, there are many things to consider. After thinking through my family's experience and speaking with a number of clients who have worn your shoes, I've come up with five things to focus on that can help make the caregiver role a little easier and less stressful.

Start early. Your parents might still be fairly independent, but it's good to start helping out with things they can still more or less do themselves. That way, when they do need help, taking on those extra responsibilities will seem less like a heavy new load and more like switching from co-pilot to pilot. If they're still handling finances just fine, for example, ask to sit in and get familiar with their various accounts, bills, and other considerations. This could also apply to house, yard, or car maintenance. This isn't you "taking over" — it's getting familiar with the ins and outs of your parents' daily lives, making you well-prepared to do more when needed.

Take inventory. You're likely already familiar with some of your parents' financial affairs—a checking account here, a savings account there, a 401(k), or credit cards. But taking stock of all those sources of income, expenses, and debt can help you not only step in when necessary but ensure you won't have any messes to clean or snarls to untangle later on. This is also a smart step to take with any real estate or other valuable property they might have in their names.

Document and communicate. As you become more involved in your parents' day-to-day affairs, it's important to keep a clear line of communication about what you're expected to do and what you've done. This is to make sure everyone involved—you, your parents, and any other siblings or caregivers—are all on the same page. There's also a small but crucial detail: their affairs are still theirs, even if they're not as capable of attending to them as they once were. Communicating clearly and frequently about what's going on can help give them a firmer sense of control over their life—something many seniors feel they lack when they start losing independence.

Make a plan—and check in often. There's a big difference between your parents knowing they need a little help and defining what that looks like. This doesn't have to be concrete or rigid, but you all should have a fairly good idea of what they need and what you can give. Is dropping by or calling them up a few times a week enough? Do they need to restrict their driving? If you're not available to meet those needs, can you get a home health aid to come by regularly? As their needs increase, more regular assistance might look like a retirement community, an assisted-living center, or even a nursing home.

In financial matters, do they just need a hand now and then to help keep up the house or figure out a confusing bill? Or do they need you to take the lead on keeping track of their entire cash flow? More involved yet, is your parents' situation one that requires a discussion about power of attorney? Whatever the case, it's best to create a plan, and then revisit it regularly to make sure it's still meeting their needs while allowing them to have as much independence as possible. Aging can be slow, but it can be dynamic, too, and keeping an open conversation can help you all be more responsive to it.

Check in with yourself, too. Caring for any loved one, especially during the course of a long illness or progressive decline, can be physically, emotionally, and psychologically draining. Caregiver fatigue is real and pervasive. According to some studies, up to 60% of caregivers will experience exhaustion, irritability, and other symptoms. There are many ways to combat this, and support groups are available. When you do notice yourself feeling progressively rundown, be proactive in finding opportunities to rest or share the load to prevent burnout.

Caring for aging parents can be a tough time in life, for you and for them. But it can also be a special time — a way to draw even closer together. After all, in the end, you are showing your parents how much you love them, just as they once showed how much they love you.

As you and your parents proceed with the process of swapping the role of caregiver and cared-for, keep these five things in mind... and always let me know if there is ever anything I can do to help.

Q2 MARKET RECAP

Imagine you were given two pairs of special glasses that were designed to look backward in time rather than forward in space. The first pair can only see how the markets did; the second pair is designed to focus on the economy.

Each would give you a very different picture of how the second quarter went.

The first pair would show you that the markets had their best quarter since 2020. The Dow gained nearly 13%. The S&P 500 rose 14.9%. And the Nasdaq shot up an astonishing 21%![1]

The second pair, the one that sees the overall economy, has a less rosy view. In fact, it would show you a picture of an economy in some distress. An economy where the annual inflation rate rose to 4.2% in May, the highest in three years.[2] An economy where consumer confidence fell to historically low levels in April and May (although it did rebound slightly in June).[3] An economy that may have only grown slightly in Q2 compared to its historical average.[4]

Both glasses are functioning properly. Both have the same maker. So why such different views? How can the markets be flying when the economy is grounded, and vice versa?

It's not hard to understand why the economy had the quarter it did. Turmoil in the Middle East sent a shockwave through the oil and fertilizer markets, causing the goods and services that depend on those things to rise in price. (Think food, gas, electricity, transportation, and more.) By extension, a higher cost of living depresses consumer confidence. After all, it's hard to feel confident about the future when more and more of your paycheck gets eaten up by simple necessities every month. And when consumer confidence drops, consumer spending drops…leading to slower economic growth overall.

The markets can be a bit harder to parse, but a closer look at what types of stocks performed well can provide the answers. Remember how I said the Nasdaq rose 21%, compared to 14.9% and 13% by the S&P and Dow? Well, the Nasdaq is primarily composed of technology companies. It's those same companies that powered the S&P 500's growth. A good example is semiconductor stocks, which surged 87.8% for the quarter[5]

Tech companies have been the stock market's main mover for years now due to the hope and hype around AI, and that story continued in Q2. What's interesting, however, is that while the story remains the same, the characters inside it have changed. You see, just as the tech sector has been the single biggest propellant of the market, the sector itself has been largely driven by a handful of companies like Alphabet (Google), Amazon, NVIDIA, META (Facebook), Microsoft, Apple, and Tesla. These "Magnificent Seven", as they are commonly known, have been at the forefront of the AI boom, and it's their growth that has lifted the overall markets.

But that wasn't the case in Q2. In fact, the Mag 7 actually fell during the quarter, and most have been essentially flat or even negative for the year overall.[6] Instead of AI companies, investors paid more attention to AI infrastructure. (Again, semiconductors are a great example, as without them, we would lack the raw computing power needed to run AI.) In other words, it's not the companies mining for gold, but the ones providing the picks and shovels that did well in Q2.

But none of this addresses the question I posed earlier. How can those two pairs of glasses show such diametrically different views?

The answer is a simple but critical truth: The markets and the economy are not the same.

The economy is how much our country produces and consumes. It's the sum total of everything we make, buy, trade, and use. It's the economy that drives our daily experiences.

The stock market, on the other hand, represents something far less tangible. It is the sum total of what we think, expect, and, yes, hope will happen in the future. It's the market that drives our dreams and goals.

Politicians and pundits often like to use these two terms interchangeably, depending on which one makes them look better. Most common is when the markets are used as a stand-in for the economy. That's because, while the markets are often hard to understand, they are easy to read: They go up or they go down.

As investors, though, it's important that we remember that each is different and affected by different things. That's because our feelings about the economy can sometimes color our opinions of the markets. This is largely due to something called status quo bias: The feeling that the current state of affairs will go on forever. When we feel frustrated or exuberant about the economy, it can impact how we invest, and not always in predictable ways.

For example, it's easy to picture someone who, feeling negative about the economy, lacks confidence in the future and decides not to invest. But economic angst can also cause people to take more risk in the markets. In fact, there is some indication that is happening now. A recent survey found that 80% of Gen Z respondents — people born in the late 90s and early 2000s — often make "high-risk or speculative" investments because they feel financially left behind.[7] And the Federal Reserve reported last year that American households now hold an all-time high of 45% of their total financial assets directly in stocks.[8]

That surpasses the previous record set during the dot-com bubble.

More stock market participation

is generally a good thing, and it's probably another reason why the markets performed well in Q2. But it can be a red flag when more and more people are taking on more and more risk due to their feelings about the economy.

On the other hand, market exuberance can sometimes make us forget the realities of the economy…realities that may eventually impact the stock market. Higher inflation can lead to higher interest rates. When both become "sticky," it can prompt fears of a recession, which in turn can drag down the markets. (We experienced this in 2022.) Failing to remember this can also cause investors to start chasing ever higher returns, forgetting all about risk in the process.

The point is to emphasize that there are two mistakes investors can make when it comes to the relationship between the markets and the economy. The first is to confuse one for the other, or to use one to drive our decisions regarding the other.

The second is to ignore one and focus solely on the other, forgetting that, while they are different, they do have a relationship…and there are times when both can converge.

Remembering this is all the more important after a great quarter in the markets. We cannot predict the future, of course, so it's quite possible the economy will improve in Q3, and that the markets will continue progressing upward. But when the economy and the markets diverge this sharply, it's worth asking ourselves whether what we're seeing in stocks is driven more by hype and speculation than by real, solid fundamentals.

It's also worth preparing ourselves for that possibility.

So, a great quarter for the markets; a not-so great quarter for the economy. While we certainly cheer the former, we will continue watching the latter carefully. After all, that's what you rely on us for: To keep our glasses on, and our eyes open.

1 "S&P 500, Nasdaq register best quarter since 2020 despite Iran war," Reuters, https://www.reuters.com/business/us-stock-futures-little-changed-strong-quarter-nears-end-2026-06-30/

2 "Consumer prices rose 4.2% annually in May, highest in three years," CNBC, https://www.cnbc.com/2026/06/10/cpi-inflation-report-may-2026.html

3 "The Index of Consumer Sentiment," University of Michigan, https://www.sca.isr.umich.edu/files/chicsh.pdf

4 "Current and Past GDPNow Commentaries," Federal Reserve Bank of Atlanta, https://www.atlantafed.org/research-and-data/data/gdpnow/current-and-past-gdpnow-commentaries

5 "Semiconductor stocks just had their best quarter ever," Axios, https://www.axios.com/2026/07/01/semiconductor-ai-stocks-chips

6 "Mag 7 value shrinks by $2.3 trillion," CNBC, https://www.cnbc.com/2026/06/30/magnificent-7-stocks-sell-off-investors-grow-jittery-on-ai-spending.html

7 "Americans' Finances are Improving – But Some Still Feel Behind," Northwestern Mutual,https://news.northwesternmutual.com/2026-03-09-Americans-Finances-are-Improving-But-Some-Still-Feel-Behind-and-are-Turning-to-Prediction-Markets,-Sports-Betting-and-Crypto-to-Catch-Up,-According-to-Northwestern-Mutuals-2026-Planning-Progress-Study

8 "Americans have more money in stocks than ever before. Economists say that's a bright red flag," CNN Business, https://www.cnn.com/2025/09/28/business/us-stocks-record-highs-american-households

NELSONCORP MEDIA APPEARANCES

Be sure to catch our weekly educational content featured locally on television, radio, and the newspaper. You can get this and more at www.nelsoncorp.com/blog.

On 4 Your Money, David Nelson discussed Social Security funding challenges, warning future retirees could face reduced benefits without reforms. He urged viewers to strengthen retirement plans beyond Social Security through added savings. John Nelson highlighted rising federal reliance on short-term borrowing, noting shorter debt maturities increase sensitivity to interest-rate changes and market uncertainty. David Nelson also addressed trade policy uncertainty, tariffs, and Middle East tensions, explaining these headwinds may fuel volatility. He encouraged investors to stay disciplined and focused on long-term financial planning.

4 Your Money airs on WHBF CBS Local 4 News at approximately 6:10pm.

Andy Ferguson and Nate Kreinbrink highlighted key 2026 tax changes, including higher contribution limits, new Roth catch-up rules for high earners, charitable deduction opportunities, and the introduction of Trump Accounts. David Nelson and Gary Determan discussed staying disciplined through market volatility, avoiding emotion-driven investing, and applying common sense when evaluating complex trends like cryptocurrency and AI. Andy Ferguson and Nate Kreinbrink reviewed IRS notices, estimated tax penalties, IRS online accounts, and retirement planning adjustments. Proactive planning and informed decisions remain essential for long-term financial success.

Financial Focus airs every Wednesday at 9:00 am on KROS FM 105.9 and AM 1340.

ON A PERSONAL NOTE...

DAVID NELSON

Summer has been filled with wonderful moments spent with our grandchildren—cheering them on at sporting events and enjoying all kinds of fun activities together.

One of the highlights of our summer was having our entire family together in Minnesota, our favorite week of the year. We made the most of our time with plenty of fishing, boating, jet skiing, campfires, and lots of laughter. Those simple moments created memories we'll cherish for years to come. We're excited to share one of our favorite family photos from our week in Minnesota.

Looking ahead, Sally and I are also excited about an upcoming cruise, where we'll have the opportunity to visit beautiful destinations and experience new parts of the world together.

EUGENE KRUEGER

Hello and happy August everybody. 2026 has been a very unusual year for Wife Susan, our dog Nelly and I as we're still in Florida as the new home that we're having built in Bettendorf's County Limits is still under construction. We were thinking it'd have been done in May or June but it didn't happen. When NelsonCorp Client Events happen, after we get back north, we'll look forward to seeing all of you.

Our Granddaughter Lydia just turned 19 on July 6th so when we are with her next time, we'll certainly celebrate with her as she's with her Dad Aaron in the picture.

I hope that all is going good for everyone, thank you for your use of our Services and more importantly, THANK YOU FOR YOUR FRIENDSHIP!

KEN NELSON

Another fishing trip is in the books. This was our third annual trip to a fishing resort north of St. Cloud, Minnesota, and it was another wonderful trip. We started this back up three years ago, as this was one of our favorite trips that my wife and I took with family back around thirty-five years ago. We are staying at a different resort now, as our previous one has been sold, but it is still on the same chain of lakes. Both of our sons were just infants back then and now look at them! Grown men with beautiful families. Boy how time flies by way too fast. Fishing was great, and time with the grandchildren, priceless. Note all of the adults are sporting the Bass Club hats that my daughter-in-law made up for the trip. Some of us earned the right to wear them, and some did not. I won't mention any names! Hope you all are having a wonderful summer and staying cool!

AMY CAVANAUGH

Happy summer! I like the long days and warm weather. It's been nice to see a lot of clients this summer at our baseball events. We had a fun trip to the Texas hill country with a group of friends in June, and I bought my first cowboy hat! We enjoyed celebrating July 4th with family and celebrated three birthdays this summer with grandkids. I hope you enjoy the rest of your summer.

NATE KREINBRINK

Hopefully everyone's summer is going well, as it is flying right by. The first half of the year was jam packed with basketball, golf and recently finishing up baseball seasons. We were able to take a family vacation over spring break to Punta Cana. It was a relaxing trip, and time well spent with all 5 of us together for a week. Alijah is busy with his 2nd season at Eel River Golf Course near Ft Wayne, IN., where he serves as the Lead Assistant Golf Pro. When school starts back up in the fall, Emerson will be a senior and Braxtyn will be a 7th grader. This next year will surely fly by, but looking forward to a few quiet weeks to end the summer. I hope to catch up with each of you at one of our events this summer and into fall.

JAMES NELSON

I hope everyone is enjoying the summer! It has been great catching up with many of you at our recent office events.

My family has certainly been keeping me busy outside of work. We just returned from our annual trip to northern Minnesota, where my entire side of the family gathered for a week of fishing, lake activities, and family time.

The girls recently wrapped up softball and are now staying busy with basketball and volleyball for the rest of the summer. It seems like sports keep us on the go year-round, and we're enjoying every minute of it.

I hope to see many of you at our remaining events this year or during your visits to the office. I always enjoy the chance to catch up and hear what's new in your lives.

JOHN NELSON

Summer has been fun, highlighted by a week in Minnesota enjoying some great fishing and celebrating both Charlotte and Isabelle's birthdays. Charlotte recently turned one, and Isabelle celebrated her sixth birthday. Will and Isabelle have also spent plenty of time outdoors this summer, staying active with soccer, golf, football, and tennis. I look forward to seeing many of you in our offices and at upcoming events soon. Wishing you all a happy and memorable summer!

JAKE WOODCOCK

I hope everyone is enjoying their summer and staying cool! Since school let out, getting things done around the house and tending to the farm has kept us pretty busy. We have also managed to do a little traveling and get in some fishing. We went to Minnesota for a week where Gabriel and Zara were looking forward to catching some Northern Pike. They both managed to catch some, as well as plenty of other fish. All the kids enjoyed the water, having fun tubing and riding the wave runners. We're looking forward to another trip or two before school starts up again, hopefully with a lot more fun and fishing. Have a great summer!

VAL HILL

I hope you're all having a wonderful summer! It's been a busy and exciting first half of the year for us. One of the highlights was a fabulous trip to St. Maarten with friends (pictured), where we enjoyed beautiful beaches, great company, and plenty of time to relax.

Back at home, we took on a complete living room remodel—from the flooring and walls to the furniture and décor. It was a big project, but we're thrilled with how it turned out. We just have a couple of finishing touches left before we can officially call it complete.

As summer continues, we're looking forward to a trip to Minnesota to spend time with my family. We're also hoping to catch a Chicago Cubs game and an Indiana Fever game before the season winds down.

JAMIE HUGUNIN

Sweet Summertime! I hope everyone is enjoying summer. Brian and I have been busy chasing and having fun with 3 wild boys! Miles and Everett wrapped up soccer season in May and Miles just finished up T-Ball. They both enjoyed soccer, but I can already see Miles' passion for baseball. It's even more fun as a parent to watch them grow with a sport that they love. Levi is 1 now and speed walking all over the place trying to keep up with his big brothers. He's saying several words and little phrases and it's the sweetest hearing his little voice saying more and more. He also loves to dance! We took our 2nd trip to the Dells and the boys loved it even more this year. All 3 of them love the water. Miles and Everett enjoyed the thrill of the waterslides. Miles will be starting 1st grade in August and Everett will be starting Pre-K. Time sure flies!

MICHELLE EVERSOLL

My husband and I are loving every minute of being grandparents to our two grandsons, Kaeson (3½) and Beckner (2 months). Kaeson loves T-ball, riding his bike, and is excited to start preschool in a couple of months. Beckner is enjoying all the newborn things like eating, snuggling, and discovering his hands and feet. They bring us so much joy, and we cherish every moment we spend with them.

We recently took a family trip to St. Louis, where we visited the zoo, the City Museum, and Grant's Farm. This photo was taken during that trip.

MIKE STEIGERWALD

What a wild start to summer we have had with lots of rain and storms, along with some heat and humidity! Our family has had quite a busy summer so far, with more excitement to come. We recently got back from a trip to Crosslake, MN where we enjoyed time with family, boating, and fishing. Our boys were all worn out after a week filled with sun and fun. Here is a picture of us where we went to a fest in the Crosslake town square. We also took a trip to Chicago to bring the boys to their first Major League game to cheer on the White Sox! They were thrilled to receive balls from a few players in the dugout and really enjoyed the ballpark experience! I wish you all a fun and safe end of summer and look forward to seeing you soon!

TRAVIS MOREHEAD

I hope everyone is enjoying their summer. It's been great keeping up with everyone through the ballpark events. We always have a great time with those. I've been enjoying the usual festivities, being outside, grilling, golfing, and getting together with friends and family. We were able to get the family together around the 4th of July weekend. It is hard to believe how fast my nephews and niece are growing. They were really enjoying the fireworks and sparklers. Outside of that, I've been keeping up with the ever-so dynamic Chicago Cubs. I'm cautiously optimistic about the postseason this year. Here's a picture of my brother and I borrowing our parent's little convertible for a spin. Have a great end to summer and start to fall!

AMANDA SCHAVER

I hope everyone is having a wonderful summer so far! Looking back, it has been a great one for me. I hiked at Starved Rock, enjoyed a productive staycation in June, and spent time taking in

ON A PERSONAL NOTE...

live music.

The things I'm most looking forward to are an upcoming girls' trip to Indiana with my "forever friends" and watching my niece, Moxie, perform as a Who from Whoville in Seussical the Musical. The photo I'm sharing is of Moxie!

AUSTIN ECK

Hope everyone is having a great summer! It's been blistering hot down here in Kansas, so we escaped north for a week to visit family in Minnesota. We spent plenty of time on the lake, enjoyed the cooler weather, and made lots of great memories together. It was a great chance to slow down, catch up with family, and recharge before the second half of the year. Here's a picture of our family enjoying dinner during the trip!

HANNAH VAN HYFTE

Hello everyone! I hope you have been enjoying summer. It's been pretty quiet around my house, but we have had some big events take place this year. Tyler graduated as the Salutatorian from Prince of Peace Catholic School and will be continuing his degree at Clinton Community College in the fall. Madison took a new position as Activities Director at Addington Place in the Memory Care Unit. I'm so proud of them both. Jason and I took our first trip to an Indiana Fever basketball game and had a blast! It was so exciting to watch them play and be a part of the action. We don't have any other vacations planned at this point, but hopefully we'll manage to sneak away somewhere else fun. My new role working with John in the Davenport office has been going great and it's been wonderful getting to know the clients down here and seeing everyone at the events we've had so far this year. I look forward to seeing more of you all!

ISABEL HANSEN

Hi everyone! I hope you are all having a fun summer! Summer is the busiest time of the year for me, but I wouldn't want it any other way. A few of my favorite summer moments included going to my family's lake house in Ohio, going to Chicago with my best friends to celebrate my 23rd birthday, watching the World Cup soccer games, going on the river with my family, and going to Florida with my boyfriend. As much as I love summer, I am so excited for the fall because my older sister, Emma, is getting married in California! Here is a picture of me with my best friends in Chicago!

ANDY FERGURSON

Summer is here and we move right into a different kind of busy season! Lainey got her CNA certification, Mikaela gets married in the Fall, Aubrey graduated HS this Spring and is headed to BYU, Noah is a junior and Scarlett a freshman, James will move into 7th and Isaac into 5th grade, Selena even got a new position at the library. Then, of course, there are the vacations, church camps and summer sports programs to keep the engine running. At least we have more drivers now (although parking is getting scarce). People often ask if it feels like a 3-ring circus at our house? I tell them, "Of course it does, but who doesn't love a good circus?" Summer on the tax team is a time for continuing education, research, professional development and planning. I will see many of you in the coming months and we will plan to take advantage of the tax 2026 tax code. I hope everyone gets to make some memories this summer as well. I can't wait to see the pictures.

MIKE VANZUIDEN

Summer is always a fun time of year. The grind of tax season slows to a more comfortable pace for us accounting types. It is a welcome change that brings about a chance to get away for a bit of rest and relaxation. Christy and I were able to return to St. Pete Beach, Florida. It is a place that we love. We love the warm sun, the water, the gulf breezes and the amazing sunsets. It was a nice time to refresh and to count our many blessings. I hope that your summer brings about fun times with family and friends.

TABATHA WESTPHAL

Hi everyone! It is hard to believe that summer is half over, but here we are. The last few months have been pretty busy. Our middle daughter is moving on to high school and our son is going to be starting middle school in the fall. Time has been flying. We have been staying busy with all the sports. Track, baseball, softball, volleyball, and football to name a few! While it may be overwhelming sometimes, we wouldn't trade it for the world. Here in a couple weeks, we will take our yearly trip to the Dells and then be back at it.

I hope everyone enjoys the rest of their summer – I know I will!

MICHELLE GOODWIN

It's hard to believe summer is already flying by! Since joining NelsonCorp in January, the months have gone by in a flash. My husband, Larry, and I stay busy making the most of the season with our three kids—Michaela (13), Landry (10), and Blayne (4). One of our summer highlights was spending a week in St. Louis cheering Michaela on at her National Dance Competition, proudly embracing our roles as dance parents (and expert snack and luggage carriers!). With fall being my favorite time of year, I'm excited that is right around the corner. If you're ever near the Clinton office, I'd love for you to stop by and say hello!

KAELYN GOODSMAN

Hi everyone! I hope all of you are enjoying your summer! I love this time of the year, always such a busy but fun time! I have spent most of my time going on the river, watching my little brother's baseball games, and spending as much time as I can with my family and friends. July was a busy month! We celebrated the 4th of July out on the river. My brother won state for baseball out in Cedar Rapids. We went to Lake of the Ozarks with my parents and friends. Also celebrated my grandma and aunt's birthday by going to Adventureland with my family. August will be a slower month; I will be turning 23 on the 13th and will spend it with my family. I hope all of you have a great rest of your summer! I look forward to continuing to meet you all!

LEAVE US A GOOGLE REVIEW

Clinton Location

Scan me

Davenport Location

Scan me

Tax Services

Scan me

THIS MONTH'S FEATURED CHARITY IS WHITE OAKS

White Oaks
Therapeutic Equestrian Center
~est. 1995~

This month, we're proud to highlight **White Oaks Therapeutic Equestrian Center (WHOA)**, a 501(c)(3) nonprofit organization located at the Whiteside County Fairgrounds in Morrison, Illinois. WHOA provides equine-assisted activities and therapeutic horseback riding lessons for children and adults with disabilities. Serving individuals ages 4 through adulthood, the program supports those with physical and cognitive disabilities, autism, ADHD, anxiety, depression, and other special needs throughout Whiteside, Carroll, Bureau, Rock Island, Lee, and Ogle Counties in Illinois, as well as Clinton County, Iowa.

Through meaningful interactions with specially trained horses, WHOA helps participants improve physical abilities, build confidence, strengthen social skills, enhance emotional well-being, and develop greater focus and independence. Their programs create opportunities for therapeutic, educational, recreational, and personal growth in a supportive and encouraging environment. As a nonprofit organization, WHOA depends on the generosity of individuals and businesses to continue providing these life-changing services.

If you'd like to support this wonderful organization, donations may be made payable to WHOA and mailed to:
Tawny Wiersema
15079 Henry Rd.
Morrison, IL 61270

NelsonCorp
Investments | Taxes | Medicare

880 13th Ave N, Clinton, IA 52732

PLACE STAMP HERE

NelsonCorp
Investments | Taxes | Medicare

www.nelsoncorp.com

880 13th Avenue North
Clinton, IA 52732
(563) 242-9042

info@nelsoncorp.com

5465 Utica Ridge Rd
Davenport, IA 52807
(563) 242-9042

fax: (563) 242-9062

9079 East Tamarack Drive
Dubuque, IA 52003
(563) 242-9042