

GOOD LIFE NEWSLETTER

Happy New Year! January is the perfect time to reset, refresh, and refocus—both personally and financially. Whether you're reviewing last year's progress or setting intentions for the year ahead, we're here to help you start 2026 with clarity and confidence!



MARGIE'S MOTIVATION

"The magic in new beginnings is truly the most powerful of them all."

- Josiah Martin

WHAT'S NEW ON YOUTUBE ANTHONY'S THURSDAY THOUGHTS

Power Points: [Don't Overlook the Intangibles](#)

Power Points: [Why Almost Everyone Needs a Power of Attorney](#)

[Watch More!](#)



Check out Anthony's article of the month: [What to know now about changes to your 2025 taxes](#)



AMY'S ADVENTURES

If you're anything like me, winter can be tempting to just hunker down at home. The shorter days, the cold, and the snow sometimes make it feel easier to stay cozy on the couch. But I've found that the best way to make sure we get out of the house in the winter is to plan ahead. January is the perfect month to try something new, step a little outside your comfort zone, and give yourself a reason to look forward to the day. This month, I'm taking my own advice. Here are three fun, indoor experiences I'm hoping to join in the Twin Cities.

Pottery at Dame Errant

I just signed up for a clay sculpting class at Dame Errant, and I can't wait to get my hands dirty! Pottery is not only creative and meditative, but also a chance to make something tangible and personal. Beginners are more than welcome, and it's a great way to connect with other people while learning a new skill.

Cooking Class: Perfect Handcrafted Potstickers

It's been a long time since I've done a cooking class, and I wanted to try something different from Italian food, since we just did a fresh pasta class with our clients in May. I recently discovered CozyMeal, where chefs all around the country host culinary classes. Check out their website and see what culinary adventure you can go on. Bonus: several classes are offered at lunchtime during the week, perfect for our retired clients who want to fill a weekday with a little adventure.

Glass & Resin Art at Five Lanterns Studio

For something colorful and creative, I love the classes at Five Lanterns Studio. This January, I'm particularly excited about their Sea Glass Succulent and Glass & Resin Suncatcher workshops. These are beginner-friendly, allow for creative expression, and produce beautiful items you can display or gift. Plus, they partner with community ed programs across the Twin Cities, so there's usually a class near you.

CHARITY SPOTLIGHT

Wishes & More

Wishes & More is a Minnesota-based children's charity that grants meaningful wishes to kids facing terminal or life-threatening conditions. Beyond wish-granting, they provide education scholarships and memorial support for families, ensuring care continues no matter the outcome. Their mission is to bring joy, hope, and lasting memories to children and families when they need it most.



JEFF'S LIFE LESSON:

Gratitude, Community, and Taking Care of Ourselves



January offers a natural reset and a reminder that gratitude, self-compassion, and community matter more than comparison or perfection. In this reflective piece, Jeff encourages us to treat ourselves better in 2026, take small steps toward what brings us joy, and believe—truly—that we are enough.

[Read Here](#)

ERIN'S EVENT COLUMN



RMDs Made Simple: A Guide to Retirement Withdrawals

JAN 21 12pm

[RSVP](#)

State of the Markets 2026

FEB 26 12pm

Let's Connect!



steinfinancialgroup.com

Happy Holidays!



Jeff

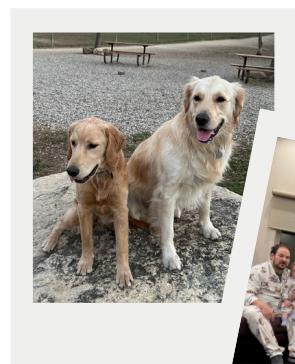
Jeanne and I had a full and meaningful 2025, both professionally and personally. The year was filled with ongoing business responsibilities that kept me busy and engaged, and I'm deeply grateful for the team that makes it all work, huge thanks to Anthony, Amy, Erin, and Margie. You keep the wheels turning every day and help ensure that the people we work with continue moving forward with confidence and success. Jeanne and I were also fortunate to travel and recharge. In late spring, we visited Colorado Springs, Denver, Moab, and Salt Lake City, with unforgettable stops at Canyonlands and Arches National Parks, which were truly awe-inspiring. In the fall, we enjoyed a New England swing through Boston, Vermont, New Hampshire, and Maine. Visiting different parts of the country continues to remind us just how beautiful and scenic the United States is, and everywhere we went, the people were welcoming, warm, and kind.

Wishing you a healthy, happy, and prosperous 2026, *Jeff*

Anthony

Looking back on 2025, our family would describe it as the year we learned about the joys of siblinghood. In January, Emily and I welcomed our second daughter, Greta. Two months later, our older daughter Matilda turned two, firmly establishing herself as a curious, expressive, and increasingly independent big sister. From there, we spent the rest of the year watching the two of them discover each other in real time. What began as curiosity slowly turned into recognition, and then into something deeper. Shared glances, small negotiations, bursts of laughter, and the more than occasional dispute over toys became part of the daily rhythm of our home. It has been a quiet joy to watch two very different personalities begin to understand that they belong to each other.

As we turn the page to 2026, our family wishes you and your loved ones a warm, happy, and healthy start to the new year.



Margie



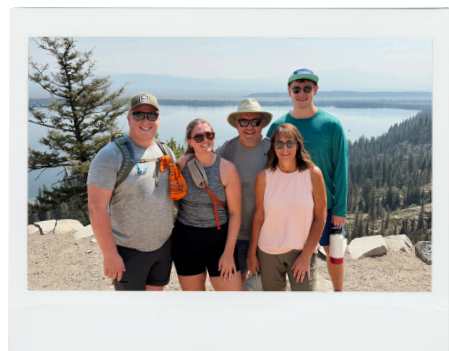
As 2025 comes to an end, it is a time to reflect on the good, the bad, and the ugly. Fortunately, my personal and business life were both very good. I continue to love what I do and being able to help our clients with both their little and big needs. On the personal side, one of the greatest pleasures that I have is spending time with my family. I have 4 grandchildren that make me smile all the time. They are equal parts loving and mischievous. They are always a joy to be around. My daughter, her wife, and their 2 golden retrievers have taken up residents in my 2-bedroom condo. One of those dogs is a 7-month-old puppy. It's always interesting, and a little crowded, but I love having them around. My dad turned 95 this year, and he loved his party so much that he plans to stick around for 100. In my spare time (the little I have) I still enjoy reading and baking. And, as I have confessed before, a good Hallmark movie. Who doesn't love a happy ending?

Amy

This year brought a lot of change and plenty to be grateful for, starting with joining the Stein Financial Group team in February. Jeff, Anthony, Margie, Erin, and Jen have not only been welcoming and supportive but also generous with their mentorship, helping me learn and grow every day. I have enjoyed getting to know our clients, learning about their lives, and helping them feel confident in their financial situations. A highlight of the year was spending an afternoon volunteering with our clients for Children's Hospital, which was such a heartwarming experience and a wonderful reminder of the kind of people we get to work with. Outside of work, I spend a lot of my time with my family. My nieces and nephews (ages 9, 11, 13, and 14) keep me busy with sports, school events, and our beloved pizza and movie nights.



Another highlight of the year was a two-week trip to Europe with my friend Tom, visiting Vienna, Salzburg, and Budapest. We spent a lot of time walking and wandering, enjoying the beauty of each city, touring castles, and sampling amazing local food. When I wasn't traveling, I did a lot of reading and finished over 30 books, with my favorite authors once again being Kristen Hannah and Kate Quinn. The year also included saying goodbye to my cat Jake, who was the best cat and will always hold a special place in my heart. Overall, it has been a year of growth and gratitude, and in 2026 my goal is to continue strengthening client relationships by helping people feel informed, supported, and empowered as they plan for the future.



Erin

2025 felt like a year that flew by in a blur of packing, unpacking, and making lots of fun memories along the way! Between family vacations, weddings, and weekend trips, I rarely had a chance to put my suitcase away for long. A major highlight was our family trip to Yellowstone and the Grand Tetons, where we filled our days with sightseeing, spotting wildlife, white water rafting, hiking, and soaking in the beautiful scenery. From the beaches of Mexico and Florida to city trips in Chicago and lake weekends up north, it was a year of constant movement and moments that made it all worthwhile.

At work, I loved continuing to plan and be part of our in-person and online events, especially as we branched out with new experiences like pasta-making and volunteer packing for Children's Minnesota. Both were a little outside our norm, yet they proved to be meaningful, fun, and rewarding ways to connect with our team and clients.

In the quieter moments between travels, I stayed busy with the usual—golfing, barre classes, boat time, reading, cooking, and exploring new walking trails. I also enjoyed going to a few concerts and getting to photograph another wedding in Duluth. Wishing you a peaceful end to the year and a 2026 filled with your own favorite adventures!