

WILDES FINANCIAL STRATEGIES NEWSLETTER



PULLING BACK THE CURTAIN ON HOW WE ASSIST YOU IN REACHING YOUR GOALS!

Our mission at Wildes Financial Strategies is to help you and your loved ones wisely steward the assets God has entrusted to you, building a legacy that endures for generations. One of the most powerful ways we pursue that mission is through *education*—equipping you with the knowledge and confidence to make wise financial decisions both now and in the future. It is a privilege to walk alongside you in your financial journey, and we are equally committed to helping you grow in understanding as faithful stewards.

In support of that commitment, we recently hosted our “*Wisdom = Wealth*” *Young Professionals Mixer*. This event was designed to provide practical, relevant financial guidance for individuals early in their careers. We focused on foundational money principles, wise decision-making habits, and long-term planning strategies that can create lasting impact over time.

We are encouraged by the engagement and enthusiasm from those who attended and look forward to offering more opportunities like this in the future. Be on the lookout for upcoming event details, we would love for you to join us. If you know someone who would be interested in attending our future events, please let us know!





HOW WE'RE INVESTING IN YOU!

The first months of 2026 have been both productive and purposeful as we continue refining how we align your investments with your values and long-term goals. Biblically Responsible Investing (BRI) remains a central pillar of our planning process, and we are constantly seeking ways to strengthen that commitment.

Last month, our leadership team—Jeff Wildes, Manuel Salazar, and Brian Taylor—attended the Kingdom Advisors *Redeeming Money Conference 2026*. This gathering brought together Christian financial professionals from across the country to explore deeper integration of biblical principles within investment strategy and client service. Through educational sessions, peer collaboration, and industry discussions, we gained valuable insight and formed new relationships that are already influencing how we evaluate investment opportunities on your behalf.

For example, after careful review, we have chosen to **fully disinvest from NVIDIA**. While the company has delivered strong performance, it has also taken an increasingly public role in advancing certain cultural initiatives that do not align with the biblical truths and framework guiding our investment process.

As stewards, we believe it is important to consider not only financial fundamentals, but also how corporate resources and influence are being used. When a company directs shareholder capital toward promoting positions that conflict with Scripture's teaching on God's design for humanity (Genesis 1:27), we believe it is appropriate to reevaluate our partnership as investors. Stewardship requires us to prioritize faithfulness alongside financial discipline (1 Corinthians 4:2).



Stewardship Requires Values Before Returns

This decision reflects principle—not reaction. Investing is not merely ownership of stock; it is participation in a company's direction and impact. Our conviction is that values must guide returns, not the other way around. We believe God calls His people to honor Him in every financial decision, including where we invest.

Scripture calls us to avoid fellowship with works that oppose God's design (Ephesians 5:11) and to pursue integrity in all things.

"Have nothing to do with the fruitless deeds of darkness..." - Ephesians 5:11

Committed to Strong, Faith-Aligned Alternatives

Importantly, exiting NVIDIA does not diminish our confidence in the long-term opportunity within the technology and AI sectors. We remain committed to identifying high-quality companies with strong growth potential that also align with our biblical screening criteria. This is the essence of Biblically Responsible Investing: pursuing excellence in performance while honoring God with every dollar entrusted to us.

Moving Forward with Conviction

Our mission remains steady. We will continue to serve you with clarity, conviction, and care—seeking both wise financial outcomes and faith-aligned stewardship for generations to come.

*"For where your treasure is, there your heart will
be also."
- Matthew 6:21*

STAYING SAFE ONLINE: SMART CYBER HABITS THAT PROTECT WHAT MATTERS MOST

Scammers continue to evolve—but with awareness and a few intentional habits, you can stay one step ahead. Older adults are often targeted because of their generosity, trust, and financial stability. The good news is that simple precautions can significantly reduce your risk.

Email Safety Tips

- Don't click unknown links. Hover over links before clicking. If it looks strange or unfamiliar, delete the email.
- Watch for urgency. Scammers often say things like "Act now!" or "Your account will be closed." Real companies don't pressure you like that.
- Check the sender's address. If it looks odd (like support@amaz0n.com), it's likely a scam.
- Never share personal info. No legitimate company will ask for your Social Security number or bank details by email.

Text Message & Phone Scam Protection

- Ignore unknown numbers. If you don't recognize the sender, don't reply — even with "STOP."
- Don't click text links. These often lead to fake websites designed to steal your information.
- Beware of fake delivery notices. UPS, FedEx, and USPS won't ask for payment or personal info via text.
- Hang up on robocalls. If a call feels off, just hang up. You don't owe anyone your time or information.

Internet & Social Media Safety

- Use strong passwords. Combine letters, numbers, and symbols. Avoid using your birthdate or pet's name. Enable two-factor authentication. This adds an extra layer of security to your accounts.
- Be cautious with friend requests. Scammers often impersonate people you know. If it feels fishy, ignore it.
- Don't overshare. Avoid posting your travel plans, address, or financial details online.

Trust Your Gut

If something feels "off," it probably is. Scammers rely on confusion and urgency. Slow down, ask questions, and talk to someone you trust — like your financial team here at Wildes Financial Strategies.

What To Do If You're Targeted

1. Stay calm. Help is available.
2. Report the incident to the FTC at reportfraud.ftc.gov and notify your bank or advisor.
3. Contact our office so we can assist you in taking appropriate next steps.

Your wisdom and experience are powerful assets. With a few proactive habits, your online security can be just as strong.

DO YOU HAVE FORGOTTEN RETIREMENT ACCOUNTS? TRY THIS NEW TOOL TO RECOVER LOST 401(K)S

At Wildes Financial Strategies, we are also always searching for new ways to help you maximize your retirement strategy. With that, we are eager to share a resource with you that could help uncover hidden savings from your past employment.

If you have changed jobs over the years, there is a chance you may have left behind a 401(k) account. Thanks to the SECURE 2.0 Act, the U.S. Department of Labor has launched the Retirement Savings Lost and Found database. This user-friendly online tool allows individuals to search for unclaimed retirement accounts connected to previous employers.

**You can access the database by visiting:
lostandfound.dol.gov**

You've used the database, now what?

If you discover a forgotten account, our team is here to help you interpret the results and assist you in integrating any newly uncovered funds into your Wildes Financial Strategy. Contact our office to let us know what you find.



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- All investments and tax strategies have the potential for profit or loss. Different types of investments involve higher and lower levels of risk. There is no guarantee that a specific investment or strategy will be suitable or profitable for an investor's portfolio. There are no assurances that an investor's portfolio will match or exceed any particular benchmark. Asset allocation, rebalancing, and diversification will not necessarily improve an investor's returns and cannot eliminate the risk of investment losses.
- The appearance of clients in photographs should not be construed as testimonial on behalf of the adviser. It is unknown if they approve or disapprove of the adviser's services.
- Any reference to specific securities is provided for illustrative purposes only and should not be considered a recommendation to buy or sell any security.
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