



Kit



Debi



Dexter



Sarah



Amanda



Leesa



Andy



Mikayla



Jenny



Allison



Elizabeth



Lindsay



Alaina



Dillon



Becca



Volume 17

Issue 2

*As we reflect on this past year, it's clear that 2025 has been a year of milestones, change, and heartfelt connection. Tiell Financial celebrated 30 years in business. Three decades of serving our clients, supporting our community, and growing together. It's a milestone that fills us with deep gratitude and excitement for what's ahead.*

*This year, we also moved into our new office which is just down the road from our previous location. If you haven't been in yet, our front entrance is the one closest to the road, under the circular sign and overhang (pictured below). We look forward to welcoming you there soon!*

*Our team has experienced many personal moments worth celebrating. We welcomed two new employees to our team, Dillon Horst & Becca Pettry. We rejoiced with Mikayla (& Colin) McKinniss as they welcomed son, Walker, and with Alaina Gosche, who married Trey Tyree. We also stood behind Sarah Whaley, as her son Connor bravely faced a relapse of cancer. Through both joy and hardship, we've been reminded of what truly matters: community, compassion, and the strength of the people who surround us.*

*As we enter this holiday season, our hearts are full. We are thankful for your trust, your partnership, and the privilege of being part of your financial journey.*

*From all of us at Tiell Financial, we wish you peace, joy, and good health this Christmas and in the New Year ahead.*



## Employee Spotlight - Alaina Tyree & Dillon Horst

At Tiell Financial, we value the ongoing growth and development of our team. After completing their training, Alaina Tyree and Dillon Horst are now ready to meet with clients and provide expert guidance and support.



### Alaina Tyree

Alaina, a Bascom local, brings a passion for serving others, and helping clients achieve their goals. She's active in the community through volunteering and serving on the board for FACT of Seneca County. Outside of work, she enjoys fitness, cooking, and spending time with her husband, Trey, and their dog, Gunner.

*Qualifications:* Associate's Degree, Marion Technical College; Ohio Insurance License; FINRA Series 7 & 66.

### Dillon Horst

Dillon, originally from Dalton, has completed his training and passed the CFP® exam earlier this year. Dillon joined Tiell Financial as an Investment Coordinator and brings strong expertise in account management and client service. He enjoys staying active, spending time outdoors, and connecting with family and friends.

*Qualifications:* Bachelor's Degree in Business Administration – Financial Planning, BGSU; Ohio Insurance License; FINRA Series 6 & 63



## 2026 Polar Bear Jump

Join us on Saturday, February 7th as we polar plunge once again for FACT! Donations may be dropped off or mailed to our office, and checks should be made out to FACT.



## Tax Updates & Seminar

We're pleased to share that our tax department continues to grow! This year, Becca Pettry has joined Leesa Fruth to expand our ability to serve more of our financial clients during tax season. At this time, we are accepting additional tax return clients from within our existing financial client base. If we aren't currently preparing your taxes and you'd like us to, please call the office to see if space is available.

Also, don't miss our upcoming Tax Seminar, where we'll discuss key updates, and include insights on *The One Big Beautiful Bill Act* and what it could mean for you in the coming year.



### Tax Update Seminar

Wednesday, January 28, 2026 - 6PM

Tiell Financial Group - 6250 W Tiffin St - Bascom, Ohio

RSVP to [sarah@tiellfinancial.com](mailto:sarah@tiellfinancial.com) or 419-937-2879

## 2026 Contribution Limits

### 401(k) Contribution Limits

Under 50 Years Old	Over 50 Years Old
\$24,500	\$32,500

### IRA Contribution Limits

Under 50 Years Old	Over 50 Years Old
\$7,500	\$8,600

### Roth IRA Phase Out Limits

Single Filers	Married Filers
\$153,000-\$168,000	\$242,000-\$252,000



## Stay Alert: Evolving Fraud & Scam Trends



Fraud and scams continue to grow more sophisticated each year. Criminals constantly adapt, using a mix of technology, social engineering, and creative deception to target individuals and businesses. Scams may appear as convincing emails, phone calls, text messages, or fake websites, all designed to create urgency, fear, or trust so you act before thinking.

Recent trends include identity theft using “synthetic identities,” fake investment opportunities promising quick returns, phishing schemes, scams through payment apps and social media, and even in-person tactics that exploit trust in the community. No matter how familiar a request may seem, fraudsters are always finding new ways to trick people.

The best defense is awareness. Verify requests for personal or financial information, pause before acting on urgent messages, and reach out directly to trusted contacts if something doesn’t feel right. We are always here to help you! Please don’t be embarrassed if you fall victim to a scam.

As part of our ongoing commitment to client education, we plan to host a seminar in 2026 focused on fraud prevention and scam awareness. More details will be shared as the event approaches, because staying informed is the first step in protecting your financial well-being.

## Updates - Medicare & Social Security COLA



The Centers for Medicare and Medicaid Services (CMS) announced the following updates for 2026:

- Medicare Part B Premium: \$202.90/ month (was \$185 in 2025)
- Medicare Part B Annual Deductible: \$283 (was \$257 in 2025)

Additionally, Social Security has announced a 2.8% COLA (cost of living adjustment) for 2026.

# Tiell Financial Group

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## **Office Hours**

Monday - Friday  
8:00AM - 5:00PM

FIND US ON FACEBOOK & INSTAGRAM!

PRSRT STD  
U.S. POSTAGE  
**PAID**  
TIFFIN, OH  
PERMIT #52



## **Holiday Office Hours**

### **Closed for Christmas**

Wednesday, December 24

Thursday, December 25

### **Closed for New Years**

Thursday, January 1

### **Closed for Good Friday**

Friday, April 3

### **Closed for Memorial Day**

Monday, May 25

### **Closed for Independence Day**

Friday, July 3

### **Closed for Labor Day**

Monday, September 7

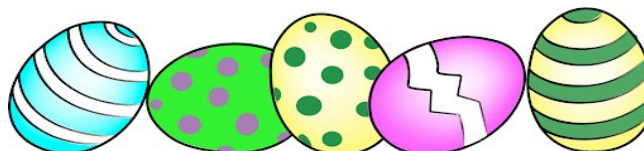
At Tiell Financial Group, we strive to be your premier financial services firm by providing holistic wealth planning tailored to your wants and needs.

It is our goal to be proactive in an ever-changing environment, provide excellent client service, and make every choice according to the highest level of ethics.

*Superior advice, superior service, because we care.*

[www.tiellfinancial.com](http://www.tiellfinancial.com)

## ***Annual Easter Egg Scramble: Saturday - March 28, 2026 at 11AM***



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