



OLYMPUS
— WEALTH STRATEGIES —

NEWSLETTER

The Peak Perspective

JANUARY EDITION

Dear Olympus Clients,

Markets to Start the Year

January has been a reminder that markets don't move in straight lines. Inflation continues to trend in the right direction, the job market remains solid, and the Fed has signaled patience rather than urgency when it comes to rate changes. That backdrop has been supportive overall, but it's also led to some back-and-forth as investors adjust expectations after a strong finish to last year.

Policy, Politics, and Volatility

Policy and political headlines have played a role in that volatility. Conversations around tariffs, government spending, and global trade have caused short-term market moves, even as the underlying economic picture remains fairly steady. At the same time, expectations for rate cuts have shifted later into the year, reinforcing the idea that the Fed wants to see continued progress on inflation before making any meaningful changes.

Looking Ahead Through the Quarter

Looking ahead through the rest of the quarter, earnings season will be an important checkpoint. Investors will be paying close attention to how companies talk about demand, costs, and the months ahead, not just the numbers they report. We expect markets to continue rotating beneath the surface, creating both noise and opportunity. In environments like this, staying disciplined, diversified, and focused on long-term goals continues to matter more than reacting to headlines.

Sincerely,

John Sidery, CFP[®], CPWA

Where are my 1099s?

Schwab has come out and stated that 1099s across the board this year will be released towards the end of February. They are waiting longer this year to help reduce the amount of corrected 1099s.

When 1099s are out we will ensure that you receive them and send them to you and/or your accountant. You will also be able to find your tax documents uploaded into the Olympus Wealth mobile app.

If you have any private market 1099s or K-1s that are not covered by Schwab, we will get those to you as well.

Time to Connect

We'll be reaching out this quarter to schedule check-ins... not just on markets, but on life. Changes in income, business plans, real estate, or family milestones are exactly what these conversations are for. If something comes up before then, reach out anytime. Our goal is simple: make sure your plan accurately reflects where you are at today and keeps moving you in the right direction.