January 2026

Hello Joe,

This month, my newsletter explores the following topics:

- A bigger tax refund could be coming
- New tax rule could boost your retirement funds
- Do you qualify for this senior tax break?
- New student loan limits apply to eleven degrees

New year, new challenges, and new opportunities. Now is the perfect time to devise and implement strategies to make the most of your financial efforts this coming year. Please contact me if I can help with those efforts.

Sincerely,
Nathaniel Banks Sr. and Barry Thomas, Licensed Financial Consultants - Nationwide Independent Agents

ncbanks@verizon.net

(804) 358-2133

(443) 744-2316

Website

Your Tax Refund Could Be $1,000 Higher In 2026. Here's Why.

Millions of filers may do a double-take when opening their refund deposit in 2026. Changes made behind the scenes are setting the stage for larger payouts, especially for certain households. Are you in the group that could see an extra $1,000 land in your account?

See More ...

New 2026 Tax Change Could Mean More For Your IRA And 401(k) Savings

Here's how the new IRS inflation adjustments are increasing the contribution limits for your 401(k) and IRA in the new year.

See More ...

Find Out If You Qualify For The New Senior Tax Break

Seniors may be eligible for an extra $6,000 deduction starting in 2025, but not everyone gets the full amount. Use this quick breakdown to see whether your income and filing status make the cut.

See More ...

Students Pursuing These 11 Degrees Will Be Eligible To Take Out Up To $200,000 In Federal Loans Under New Borrowing Limits

Federal student loan rules are about to change in a big way for graduate and professional students. Here’s what you need to know about the new borrowing caps, who qualifies, and why some fields are pushing back.

See More ...

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