

EDITION 3 | OCTOBER 2026



ELEVATED
WEALTH MANAGEMENT GROUP

*Relationship Driven - Planning Focused
Wealth Management*

**OCTOBER
NEWSLETTER**



October, 2026



WHATS NEW AT ELEVATED WEALTH MANAGEMENT GROUP

As we get ready to enter the holiday season, this is also an important time of year for us behind the scenes at Elevated. We spend these final months of the year working closely with our clients on tax-loss harvesting, tax planning, year-end account maintenance, and other planning opportunities, while also looking ahead to the year to come. We genuinely enjoy this time of year because it gives our team an opportunity to reflect on what we've done well, identify where we can continue to improve, and thoughtfully plan how we can bring even greater value to the wonderful clients we have the privilege of serving.

"True wealth is not found in markets or money— it's found in clarity, confidence, and control." - Micah Crabdree

Market Update

AI is Rewriting the Power Demand Playbook

Click the link below and learn why we have added exposure to the utility sector in our portfolios.



[READ MORE](#)



The pursuit of financial success begins with a plan

Newsletter Highlight

Financial Planning Moves to Consider Before December 31

As the year begins to wind down, it can be easy to shift your attention toward the holidays and the year ahead. But October, November, and December can be some of the most important months of the year for financial planning.

Click the link to learn more about year-end planning.



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Life At Elevated

A New Chapter at Elevated

Core takeaway:

We've grown, evolved and invested in the infrastructure behind our firm to better support our clients; but the things that matter most haven't changed: our relationships, our planning-first philosophy and our commitment to helping clients achieve what matters most.

Team Spotlight:

Carla Gladden · Branch Operations Coordinator
5-Year Anniversary

Click the link below to learn more about Carla



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Raymond James and its advisors do not offer tax or legal advice. You should discuss any tax or legal matters with the appropriate professional.

Tax-loss harvesting involves certain risks, including, among others, the risk that the new investment could have higher costs than the original investment and could introduce portfolio tracking error into your accounts. There may also be unintended tax implications. Prospective investors should consult with their tax or legal advisor prior to engaging in any tax-loss harvesting strategy.

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At Elevated Wealth Management Group, we are more than just a financial company - we are a team driven by the motivation to help you achieve and preserve what matters most.

Micah Crabdree CFP®, CRPS®, CEPA®

Founder- EWMG
Wealth Advisor – RJFS



Payson office: 928-476-7282



Gilbert office: 480-476-7599



micah@elevatedwmg.com