



We Got This.

April 2026

Retire with Peace of Mind

Saving for retirement has never been more important. Whether retirement is years away or just around the corner, We Florida Financial is here to help you every step of the way.

With Traditional IRAs and Roth IRAs, you can start saving with every paycheck or roll over a payout from a job you recently left.



Need help figuring out which account suits your lifestyle and future plans? At We Florida Financial, we're not just here to provide accounts, we're here to help you build confidence in your financial future. We also recommend consulting a tax advisor to determine what's best for your situation.

Take the next step by visiting a branch, calling us at **954-745-2400**, or scheduling an appointment today!

Save the Date! 2026 Annual Meeting

Join us to learn about our 2025 accomplishments and exciting plans for the future.

Save the date: Wednesday, May 6, 2026 at 5:00 PM EDT

The 2026 annual meeting will be held via Zoom.
We Florida Financial members may register online:

**Save
The
Date**

REGISTER NOW



Send & Receive Money

it's fast & easy with

Zelle®

Zelle® is the fast and secure way to send money to friends and family, no matter where they bank. Send money in minutes. Split the check with friends. Pay the rent. Best of all, there are no fees to send money with Zelle®!

Learn More



Get Started on Your Summer Projects with a HELOC

With summer just around the corner, now is the perfect time to bring your home improvement plans to life - and a Home Equity Line of Credit (HELOC) can make it happen. Whether you're upgrading your backyard or adding energy efficient features, a HELOC gives you flexible access to the equity you've built in your home.

Borrow only what you need, when you need it, at a lower rate than credit cards or personal loans. Achieving your vision has never been easier.

[Learn More](#)

America Saves Week: Put Your Tax Refund to Work

America Saves Week is April 6-10. What better time to save all or part of your tax refund for a rainy day?

In addition to your membership savings account, you can save in a Money Market Account, Certificate of Deposit, or Retirement IRA.

Your tax return represents money you've already earned – so make it count. Whether you're saving for a specific goal or building an emergency fund, your money should work as hard as you do.

Make this year's tax refund the foundation of something bigger for your future.



Smarter Payment Solutions for Your Business

Over 85% of consumers prefer to pay with plastic. If your business isn't making payments effortless, you could be missing out!



We Florida Financial partners with Total Merchant Concepts (TMC) to deliver powerful merchant solutions that make it simple for your customers to pay, anytime, anywhere.

From quick tap, swipe, or online payments to point-of-sale and mobile processing, we'll help you streamline transactions and boost your bottom line. Getting started is fast, secure, and hassle-free, with no long-term contracts — just a smarter way to do business.

[LEARN MORE](#)





We've partnered with GreenPath, a national non-profit committed to improving quality of life through financial wellness. No matter where you are on the journey to financial wellness, the financial experts at GreenPath can help you to take control of your financial future.



Online Course: Homebuying 101

Thinking about buying a home? That's exciting! Buying a home involves some major decisions.

It is a process that can be both exciting and intimidating, and requires lots of planning.

Take this free online course and test your readiness.

[Learn more >>](#)



Webinar: The Magic of the Debt Management Program

Are you feeling the pressure of climbing credit card balances? You're not alone! Join our partners at GreenPath to learn about a trusted, life-changing solution to pay debt off in full more manageably. Join us April 8 to see if it's the right option for you. [Register >>](#)

Èske w ap panse ak yon prè rapid? Li sa a an premye.

Prè rapid yo sanble yon fason fasil, pou prete lajan anvan pwochen peman ou. Men, souvan yo gen depans kache. Patnè nou yo nan GreenPath Financial Wellness, ofri konsèy finansye gratis, pou ede ou pran desizyon enfòmè sou prè. GreenPath ka bay yon tradiktè, pou pale avè ou an kreyòl. Rele GreenPath nan 877-337-3399.



Start Your Financial Wellness Journey

Call GreenPath: 877-337-3399

Visit [GreenPath.com/WeFloridaFinancial](https://www.GreenPath.com/WeFloridaFinancial)

Home Refresh: Aligning Your Wealth Strategy



The arrival of spring often brings that urge to start fresh. This season of renewal is a great reminder to apply the same focus to your personal finances. After all, your overall strategy should help align your goals with your time horizon and risk tolerance.



Whether you're setting aside resources for a home renovation, building toward future education costs, or preparing for the next phase of your life, a quick review might provide some insights.

If you would like to schedule a conversation to review your current strategy, your We Florida Financial dedicated investment advisor, Alexander Forster, is here to help. Use the QR code or [click here](#) to schedule.



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