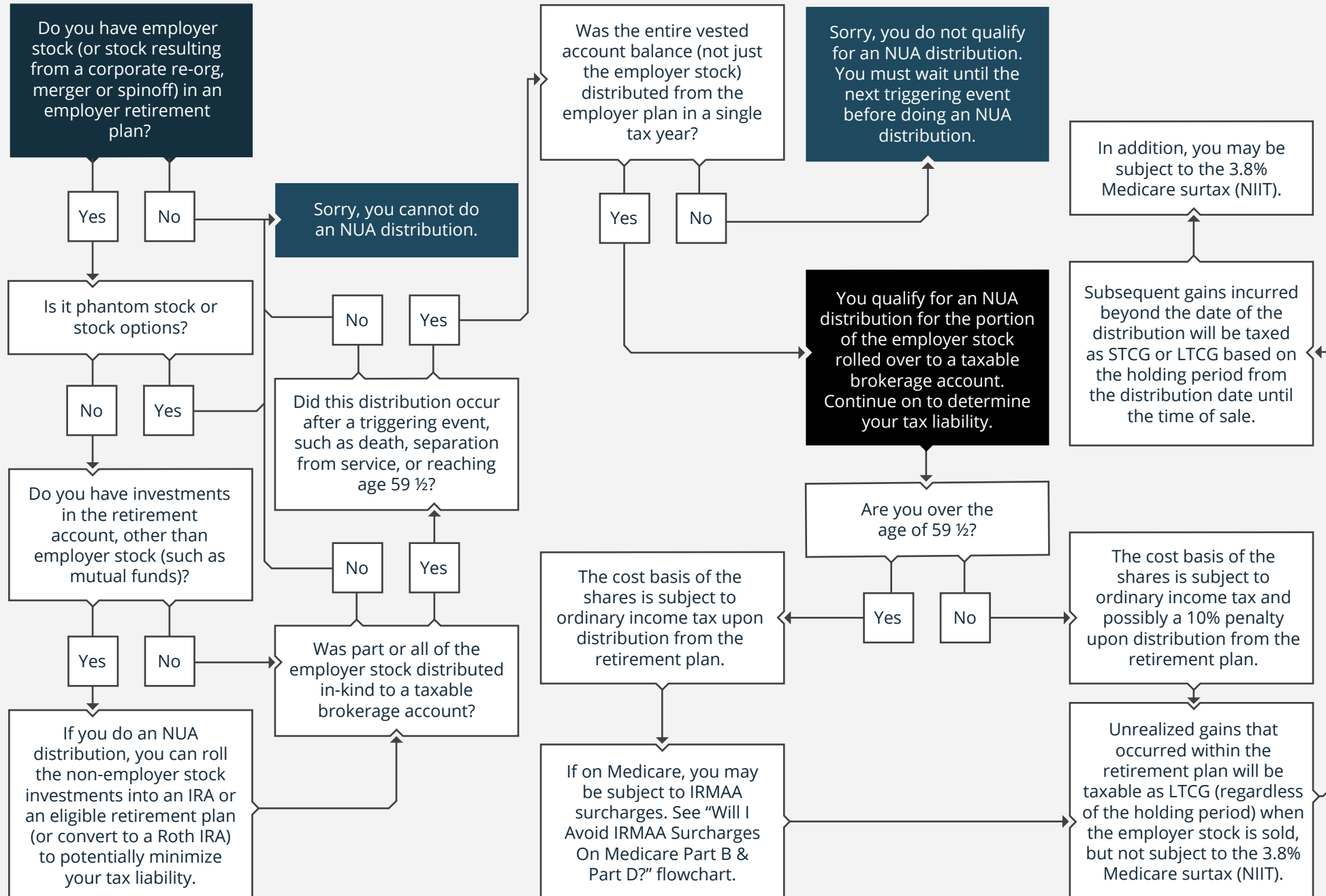


2026 · CAN I DO A NET UNREALIZED APPRECIATION (NUA) DISTRIBUTION?



Start Here



Elizabeth L. Whitteberry, RMA®, CFA®, CIPM®, AIF®, ChFC®



Elizabeth L. Whitteberry specializes in Retirement Income Planning, Tax Minimization Strategies, Wealth Management, Investment Management, Risk Management, Estate Planning, and Gifting Strategies.

Securities offered through J.W. Cole Financial Inc. (JWC) Member FINRA/SIPC. Advisory Services offered through J.W. Cole Advisors, Inc. (JWCA). Best Path Advisors and JWC/JWCA are unaffiliated entities. Neither J.W. Cole Financial, Inc. (JWC) nor its representatives provide legal, tax nor accounting advice. Persons who provide such advice do so in a capacity other than as a Registered Representative of JWC.

Elizabeth Whitteberry

105 Quail Run Street Colleyville, TX 76034

liz@bestpathadvisors.com | 817-849-1375 | www.bestpathadvisors.com