



WELCOME TO OUR

# Monthly Newsletter



WHealthy  
Empowerment  
Network

## Living & Investing With WHealthy Intention



### Get to Know Us!

**Lizz Schneider, CFP® -  
Co-Founder & CEO**

Lizz Schneider is also the Owner and Founder of Infinity Wealth Company, powered by WHEN, and an advocate for values-driven investing. She is passionate about breaking the status quo in finance and guiding clients to align their financial decisions with what matters most to them.

**Erin Zylka, CFP®, AIF®, MBA -  
Co-Founder & COO**

Erin Zylka is also the Owner and Founder of Kona Financial Planning, powered by WHEN, which helps individuals and families align their finances with their goals and values. She provides personalized guidance to empower clients to make confident financial decisions.

Welcome to our inaugural monthly newsletter! We're so excited to create a space where we can stay connected, share meaningful insights, and support you in making decisions that align with your values.

Our goal is to guide and empower you while breaking the status quo in investing and financial planning—offering an intentional, thoughtful approach to building your future. Thank you for being part of our community from the very beginning. We're grateful you're here and look forward to growing together.

With the WHealthy Empowerment Network newsletter, we plan to share thoughtful insights, practical financial guidance, and empowering resources designed to support both wealth and well-being.

Each edition will highlight timely topics, expert perspectives, and actionable strategies that align with your values while helping you grow with confidence and purpose.

### **Purposeful Planning This Tax Season**

Tax season is underway! Now is the time to get organized and proactive. Visit our website to explore our Tax Planning Guide for practical insights and strategies to help you feel fully prepared and on track with your financial goals.

**[2026 Tax Planning Guide](#)**



## OUR LATEST PODCAST

### If Not Now...WHEN? Podcast

Be sure to tune in to our *If Not Now...WHEN?* podcast, where we spark meaningful conversations around money, mindset, and living authentically while honoring your core beliefs. Each episode offers honest insights, empowering perspectives, and practical takeaways to inspire action—because if not now... WHEN?

#### Episode 6 - Do It Anyway! Living Your Truth

In this episode, we sit down with Monica Masters to explore her powerful philosophy behind “Do It Anyway.” Monica shares the courage it took to write and self-publish her first book – a deeply personal and sometimes painful reflection on her life that ultimately became a story of resilience, healing, and personal growth. Her journey reminds us that a new path often begins the moment we choose to move forward, even when fear, doubt, or uncertainty remain.

## UPDATES FROM OUR AFFILIATED FIRMS

### *Infinity Insights*

This month, much of my focus as a visionary advisor is centered on meeting with clients during tax season – reviewing financial progress, coordinating planning opportunities, and ensuring investment portfolios remain aligned with long-term goals.

It's also a natural time to evaluate rebalancing opportunities and make thoughtful adjustments as markets and life circumstances evolve. These conversations allow us to stay proactive, intentional, and focused on what matters most for each client's financial path.

#### **Lunch & Learn 3/10/26 11:30am - 1:00pm**

Topic - Estate Planning

Speakers - Attorney Amy J. Eddy & Lizz Schneider

Location - Chef's Kitchen  
924 Clark St, Stevens Point, WI 54481

**RSVP Required\***



### **Kona Korner**

At Kona, this time of year offers a great opportunity for us to reevaluate financial strategies, life paths, and make clear adjustments for the year ahead, which allow us to stay focused on clients' long-term goals. Tax strategies and additional methods to defer income also become key conversation topics. With each meeting, I'm having more meaningful conversations with clients about balance, flexibility, and aligning money with real life. As uncertainty continues to show up in many areas, my focus has been on helping clients feel grounded in their plans, reduce financial stress, and make intentional decisions that support their well-being - now and into the future.

### Contact Info

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