



June 2026 Monthly Update

As we move into the second half of 2026, major developments in the aerospace and technology sectors are creating fresh conversations among professionals, particularly around upcoming liquidity events and the interest rate environment.

With SpaceX preparing for a potential Nasdaq listing under the ticker SPCX (currently targeted for June 12, 2026, though subject to change) and Anthropic having confidentially filed a draft S-1 with the SEC on June 1, 2026, discussions around equity compensation and concentration risk are top-of-mind for many professionals. These developments highlight the importance of planning for potential liquidity events.

Meanwhile, the Federal Reserve has kept interest rates steady in the 3.50% to 3.75% range. With the next FOMC meeting scheduled for mid-June and markets expecting no immediate change, this stable environment reinforces the importance of proactive tax planning and retirement contribution strategies.

Here are several timely areas worth reviewing this month:

Equity Compensation & Concentration Risk

With notable sector developments and potential liquidity events on the horizon, now is an excellent time to evaluate how much of your net worth is tied to a single company ticker.

Roth vs. Traditional IRA Decisions

Many professionals are currently in the Roth IRA phaseout range. Understanding whether a backdoor Roth strategy or Traditional IRA contribution makes more sense given your expected future tax rate can have a meaningful long-term impact. Navigating these decisions is a bit like managing a complex, multi-year program. Small course corrections made early can have an outsized impact on the final outcome.

Trump Accounts (Section 530A)

These new tax-advantaged accounts, authorized under the One Big Beautiful Bill Act of 2025 with contributions scheduled to begin July 4, 2026, are gaining attention as families explore the \$5,000 annual contribution limit and the potential \$1,000 government seed for eligible children.

The second half of the year often brings important windows around bonuses, RSU vesting, and year-end tax planning. Addressing these items proactively can create real differences over time.

If any of these topics resonate with your situation, I would be happy to schedule a short conversation. No pressure, just straightforward planning tailored to the realities of Aerospace & Defense careers.

Wishing you steady progress on your most important programs this summer.

Best regards,

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