

2024 Monthly Newsletter

WATCH MY VIDEO BELOW Exploring the "5 Primary Risks in Retirement Income Planning"

By understanding and mitigating potential risks that can threaten your financial stability, in our featured video I explain the Five Primary Risks in Retirement Income Planning.

Empower yourself to navigate retirement with resilience!



IRA Withdrawals that Escape the 10% Tax Penalty

The list of IRA withdrawals that may be taken without incurring a 10% early penalty has grown.

[Learn More](#)

What do Your Taxes pay for?

Here's a breakdown of how the federal government spends your tax money.

[Learn More](#)



What's so Great About a Rollover?

Making a career move requires tough decisions, not the least of which is what to do with the funds in your retirement plan.

[Learn More](#)

Assess Life Insurance Needs

How to help determine life insurance needs to provide for your family after you pass away.

[Learn More](#)



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