

#### **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?

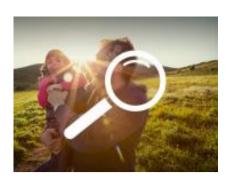
Making a career move requires tough decisions, not the least of which is what to do with the funds in your retirement plan.

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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