

Monthly Newsletter

WATCH MY VIDEO BELOW "IRA Roth Conversion: SHOULD I CONSIDER IT?"

We'll break down the differences between a Roth IRA and a Traditional IRA and help you decide if this strategy aligns with your financial goals.

If you're looking to manage taxes more effectively an IRA Conversion might be a game-changer for your retirement planning.



Inflation and Your Portfolio Even low inflation rates can pose a threat to investment returns

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Reviewing Your Life Insurance Needs

Learn how the review process works and how it may help you better understand your Life Insurance.

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Financially Savvy at Six Figures

Help your clients with these practical steps to make the most of their six figure income.

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Are you available for a Mid-Year Check-in? We always appreciate this chance to discuss your portfolio, insurance coverages, answer any questions, and stay up-to-date with any changes in your life.

If you've experienced any updates we haven't yet discussed --family, job change, inheritance, assets, retirement planning--we should talk. We're also available to discuss your portfolio in detail, listen to any ideas you may have and discuss overall market conditions.

Don't hesitate to let us know if you have any questions in advance, and we look forward to speaking with you soon.

[Schedule Mid-Year Check-In with Tom](#)



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