October 27, 2021

Join Our Mailing List!

Financial Topics That Count

The topics listed below are intended to cover a wide variety of financial situations. Information is available to help you understand your current financial situation and make informed decisions. To request information on topics that interest you, simply email us.

Life Events

- Buying a Home
- Getting Married
- Raising a Family
- Child with Special Needs
- Changing Jobs
- Getting Divorced
- Starting a Business
- Caring for an Aging Parent
- Death of a Family Member

Personal Finance

- Budgeting and Cash Reserves
- Establishing or Maintaining Credit
- Credit Cards
- Homeownership
- Buying or Leasing a Car
- Identity Theft

Insurance Planning

- Protecting Your Loved Ones with Life Insurance
- Estimating Your Life Insurance Needs
- What Type of Life Insurance Is Best for You?
- Creating an Estate Plan with Life Insurance
- Long-Term Care Options
- Financial Impact of a Disability

Education Planning

- Saving for College
- 529 Plans
- Financial Aid
- Student Loans
- Repaying Student Loans
- Education Tax Credits and Deductions

Retirement Planning

- IRAs
- Employer-Sponsored Retirement Plans
- Annuities
- Strategies for Retirement Plan Distributions
- Saving for Retirement
- Planning for Income in Retirement

Investment Planning

- Investing Basics
- Setting Investment Goals
- Designing and Managing an Investment Portfolio
- Handling Market Volatility
- Asset Allocation and Diversification
- Taxable vs. Tax-Free Investing
- Stocks

- Bonds
- CDs
- Mutual Funds/ETFs
- Separately Managed Accounts

Social Security and Medicare

- Understanding Social Security
- Social Security Retirement Benefits
- Social Security Disability Benefits
- Medicare
- Medicare Prescription Drug Coverage

Tax Planning

- Income Tax Planning
- Year-End Tax Planning
- Investment Tax Planning
- Alternative Minimum Tax (AMT)
- Gift and Estate Taxes

Estate Planning

- Wills and Trusts
- Planning for Incapacity
- Creating and Preserving a Family Legacy
- Using Life Insurance in Estate Planning
- Strategies to Minimize Estate Taxes
- Charitable Gifting Strategies

If you would like information about a topic not listed here, please let us know.

My staff and I deeply appreciate the continuing opportunity to work with you. Please let me know if you have any questions or requests. Thank you.

Sincerely,

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