

March 2022

Hello Joe,

This month, my newsletter explores the following topics:

- [How to fight rising inflation with your tax return](#)
- [Retirement distribution strategies to make your money last](#)
- [18 legal secrets to reducing your taxes](#)
- [Three reasons to keep your estate plan updated](#)
- [Why save money instead of investing it all](#)

As we get further into 2022, please contact me if I can help you with your finances.

Sincerely,
LANNY LEVIN, CLU®, ChFC®
President



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There's A Way To Fight Rising Inflation With Your Tax Return. Here's What To Know

If surging costs are a concern, you may consider using your tax refund to bypass the purchase limits on I bonds, a nearly risk-free and inflation-protected asset. Learn more about upsides and drawbacks of I bonds.

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9 Retirement Distribution Strategies That Will Make Your Money Last

Want long-term financial security? Don't tap into your retirement savings without a plan.

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18 Legal Secrets To Reducing Your Taxes

Don't miss these tax deductions and credits, which can add up to significant savings.

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Be Sure To Keep Your Will Or Estate Plan Updated. Here Are 3 Key Reasons Why

When it comes to creating a will and other estate-planning documents, be aware that you probably should revisit them many times before they actually are needed.

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My Friend Was Appalled To Hear I Keep 10% Of My Net Worth In Cash Instead Of Investments, But I Have 5 Good Reasons To Do It That Way

Jen Glantz's friend convinced her to move a big chunk of cash into stocks, index funds, cryptocurrency, and real estate, but she decided to ignore those options and stick to her plan. Here are five reasons why Jen plans to stick to her own savings plan instead.

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