

February 2023

Hello Joe,

This month, my newsletter explores the following topics:

- [Congress passes new retirement rules](#)
- [Mistakes when writing a financial power of attorney](#)
- [Five tax-smart charitable giving strategies for retirees](#)
- [Creative ways to finance a home purchase](#)
- [Five no-brainer retirement moves for 2023](#)

Volatility in the markets and the economy raises many questions. Please contact me if you would like to discuss your finances.

Sincerely,
LANNY LEVIN, CLU®, ChFC®
President



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Congress Passes New Retirement Rules. What These 7 Changes Mean For You And Your 401(K)

SECURE 2.0 “will help increase savings, ensure greater access to workplace retirement plans, and provide more workers with an opportunity to receive a secure stream of income in retirement,” said the president and CEO of a large US retirement service provider. Here’s a look at seven of the SECURE 2.0 provisions, based on a breakdown from the Senate Finance Committee.

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5 Mistakes To Avoid When Writing A Financial Power Of Attorney

Financial power of attorney is a powerful tool in your estate planning tool belt, but by failing to name a backup and granting overbroad gifting powers, you could stumble into some serious consequences.

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5 Tax-Smart Charitable Giving Strategies For Retirees

There’s still time this year to do well by doing good, and there are still tax advantages to be had in charitable donations by retirees. Act soon, though!

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Financing A Home Purchase: 6 Creative Ways

Given the current interest-rate environment, high prices and recession fears, many potential homebuyers find themselves priced out of typical mortgage financing. Here are six creative alternatives to traditional mortgages for eager homebuyers to think about — some have a certain amount of risk involved, so consider carefully.

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5 No-Brainer Retirement Moves For 2023

Taking certain actions now and in the future can set you up for a much more financially secure retirement. Here are five you might consider. Here are five actions you might consider.

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