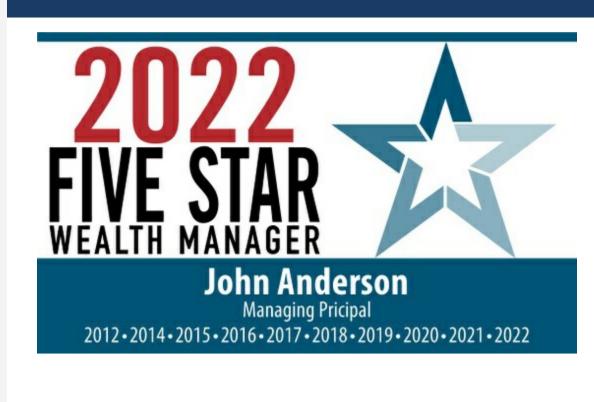


Advisor Insights



Five Star Wealth Manager MORRISTOWN, N.J., Jan. 27, 2022 /PRNewswire/ -- John A. Anderson,

John A. Anderson Named "Five Star Legend" After Tenth Time as A

CLU of Chester, NJ where he resides with his wife Beth and their two children, Jack and Charles, was named a 2022 Five Star Wealth Manager. This is the tenth time Mr. Anderson has been awarded with the prestigious title, making him a "Five Star Legend".

Mr. Anderson is Founder and Managing Principal of Tempewick Wealth

Management located in Morristown, NJ which he formed in 2006.

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This year, the stakes for Democratic lawmakers in Washington are as high as they've ever been. Recent polling reveals that voters

overwhelmingly disapprove of the job Congress is doing—by more than 43 percentage points. And Democrats can't look to President Biden to save them because he's not faring much better. Add to this the signal last fall from the state races in New Jersey and Virginia in which Republicans overperformed in states that President Biden won, and the picture looks grimmer for Democratic control of Congress continuing into next year.

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Internal Revenue Service life expectancy tables go into effect. "It's been 20 years since the IRS last updated these tables," writes Natalie

Choate, an attorney in Wellesley, Massachusetts, "so some advisors may have forgotten that such a change was even possible."

Required minimum distributions will be smaller starting in 2022 as updated

The new tables can be found at the end of IRS Bulletin 2020-49, published in November 2020, according to Choate, who explained the changes in a recent Morningstar column, "New Year, New IRS Life Expectancy Tables."

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expensive, but is it effective? Do the trusts actually protect assets? "Yes, they work," says Daniel Rubin, a partner at Moses & Singer in New

If you have wealthy clients—especially ones who own a medical practice, real estate or another business that makes them potential targets for easy lawsuits—you might have considered an asset protection trust. It can be

York and chair of its Trusts and Estates and Asset Protection Planning practice groups. They work particularly well for clients seeking protection from "the possibility of a future creditor, rather than an existing creditor or even an anticipated creditor," he adds.

O INTERNAL REVENUE SERVICEO



delays.

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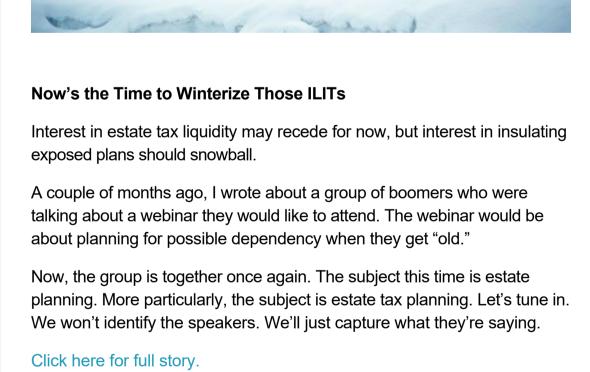
Expect Delays During 2022 Tax Season Ready or not, tax season is here ... and the Internal Revenue Service says it isn't ready. The IRS will begin processing 2021 federal individual income tax returns on Jan. 24. However, while the filing deadline hasn't changed, the IRS is still reporting being backlogged, underfunded and understaffed. The COVID-19 pandemic began to highlight some of the problems that existed within the IRS. As federal workers were sent home

in March 2020, the IRS had limited capability for employees to work

a statement that it's preparing to accept filings but to be prepared for

remotely and no plan to sort through and process mail, although the IRS reports having 61,000 working remotely. Now, in 2022, the IRS has issued

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Managing Principal

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The Five Star Wealth Manager award, administered by Crescendo Business Services, LLC (dba Five Star Professional), is based on 10 objective criteria: 1. Credentialed as a registered investment adviser or a registered investment adviser representative. 2.

on 10 objective criteria: 1. Credentialed as a registered investment adviser or a registered investment adviser representative. 2 Active as a credentialed professional in the financial services industry for a minimum of 5 years. 3. Favorable regulatory and complaint history review; 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients. 6. one-year client retention rate 7. Five-year client retention rate 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations. Wealth managers do not pay a fee to be considered or awarded. Once awarded, wealth managers may purchase additional profile ad space or promotional products. The award methodology does not evaluate the quality of services provided and is not indicative of the winner's future performance.

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