

May 2022

Hello Joe,

This month, my newsletter explores the following topics:

- [Financial pearls of wisdom from mothers to daughters](#)
- [When do living trusts make sense?](#)
- [Three strategies for reducing tax risks in retirement](#)
- [How long to keep tax documents](#)
- [The most profitable improvement a homeowner can make](#)

Events in the world and the U.S. economy are leading many people to revisit their financial situation. Please contact me if you would like to discuss your finances.

Sincerely,
LANNY LEVIN, CLU®, ChFC®
President



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lanny_levin@levinagency.com



(847) 863-2860



[Website](#)

10 Financial “Pearls Of Wisdom” From Mothers To Their Daughters

Boomer women are the first generation to own and control financial accounts. They've built careers and 401(k) balances. Here are 10 financial “pearls of wisdom” mothers are sharing with their daughters today.

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When Do Living Trusts Make Sense?

A trust can solve a lot of problems. But like all tools, it can also be misused. There are plenty of opportunities to make costly mistakes, particularly when transferring your assets to a trust.

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3 Strategies For Reducing Tax Risks In Retirement

Don't let taxes surprise you during retirement. The funds you've saved for your post-work life may be taxed, too, unless you carefully plan.

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How Long Do You Need To Keep Tax Documents?

Come tax time, money expert Clark Howard says he always gets questions about how long you should keep tax-related documents. This article discusses how long to keep your tax documents and why, according to Clark.

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This Is The Most Profitable Home Improvement—Can You Guess What It Is?

The most profitable improvement homeowners can make to boost their resale value isn't as sexy as a kitchen with marble counters and stainless-steel appliances or as fun as a backyard pool or hot tub. Instead, the work that pays off the most is far less exciting.

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President



lanny_levin@levinagency.com



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[Website](#)

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5141 Cote du Rhone Way, Sarasota, FL 34238

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