

August 2022

Hello Joe,

This month, my newsletter explores the following topics:

- [Capital gains tax 101](#)
- [Tax-smart charitable giving strategy using IRA money](#)
- [Mistakes to avoid when updating your estate plan](#)
- [What if your company changes 401\(k\) providers?](#)
- [How to use the retirement bucket strategy](#)

With the fall season right ahead of us, please contact me if you would like to discuss your finances.

Sincerely,
LANNY LEVIN, CLU®, ChFC®
President



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Capital Gains Tax 101: Basic Rules Investors And Others Need To Know

Learn the ins and outs of the capital gains tax, which you may owe if you sell stocks, your home, cryptocurrency, a stamp collection, and much more.

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Here's A Tax-Smart Charitable Giving Strategy Using Money From Your IRA

Over the past few years, there's been no shortage of ways to give to charity. And there's a special tax break for retirees who transfer funds from individual retirement accounts.

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Updating Your Estate Plan? Don't Make These Top Mistakes

You're making the effort to stay on top of your estate plan. That's great! Now don't mess it up. Here is how to avoid five of the biggest blunders people often make.

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What To Know If Your Employer Changes 401(K) Providers. 'Mistakes Happen' In Transfers, Advisor Warns

Your company is switching its 401(k) provider. What should you do?

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How To Use The Retirement Bucket Strategy

Learn about the three financial buckets that can help you manage your retirement spending and investing.

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