

M A P P A WEALTH MANAGEMENT  
NEWS AND VIEWS

July/August 2020, Volume 3, Issue 7

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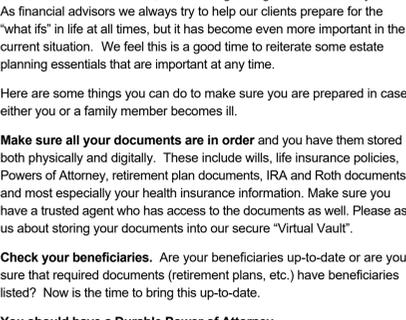
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Please share this newsletter with friends and colleagues  
who may be interested in this information.

Important  
Estate Planning Essentials



It's been said over and over, we are living through an extraordinary time. As financial advisors we always try to help our clients prepare for the "what ifs" in life at all times, but it has become even more important in the current situation. We feel this is a good time to reiterate some estate planning essentials that are important at any time.

Here are some things you can do to make sure you are prepared in case either you or a family member becomes ill.

**Make sure all your documents are in order** and you have them stored both physically and digitally. These include wills, life insurance policies, Powers of Attorney, retirement plan documents, IRA and Roth documents and most especially your health insurance information. Make sure you have a trusted agent who has access to the documents as well. Please ask us about storing your documents into our secure "Virtual Vault".

**Check your beneficiaries.** Are your beneficiaries up-to-date or are you sure that required documents (retirement plans, etc.) have beneficiaries listed? Now is the time to bring this up-to-date.

**You should have a Durable Power of Attorney.**

During this time when we could all become seriously ill and incapacitated, a Durable Power of Attorney is very important. It allows the named agent to do everything from paying monthly bills to making gifts and paying taxes. Unlike other powers of attorney, it allows your agent to make decisions if you become mentally incompetent or incapacitated, i.e. if you are put on a ventilator.

**Have an Advanced Health Care Directive.**

This document spells out an individual's specific wishes about medical treatment when he/she is not able to make those decisions. Your healthcare authorizations should also include a HIPAA\* authorization so that the person who is carrying out your directive is able to be kept up to date on your medical condition.

**College Age Children**

No one is quite sure what will happen with colleges and students this fall. But we do know that if your child is 18-years old, you no longer have a right to his/her healthcare information or to make medical decisions for them under HIPAA. There are three forms you should fill out as soon as your child turns 18, a HIPAA Authorization form, a Medical Power of Attorney and a Durable Power of Attorney. You will need the forms for the state you live in and the state in which your child's college is located.

These are difficult times in many ways, but all of us at Mappa Wealth Management are here to help you in any way we can. Please feel free to call us with questions or concerns.

\*Health Insurance and Portability Act

**We Are Moving**  
August 2020; More Details To Follow

We are very excited to let you know that we are moving our main office to 400 Skokie Blvd. Suite 550, Northbrook Ill. 60062 in August.

As we continue to grow, we needed to consider our clients and our space. We know that you will appreciate the new offices and how it better meets your needs.

Our office at 401 North Michigan Ave. in downtown Chicago remains open for your convenience. All of our phone numbers and contact information will remain the same.

We will keep you informed about an official opening for clients and guests as we move forward.

Join Us For A Very Special Zoom Presentation

Politics in America – The 2020 Election

The 2020 election may be the most significant election of our lifetime. The political parties offer starkly different views that will define American policy and its place in the world for years to come. Not just for the economy, which is paramount but on healthcare, trade, taxation, individual

**Join Mappa Wealth Management and our Special Guest**

**Peter Lefkin, Senior Vice President, Government & External Affairs for Allianz of America.**

For a Very Important Virtual/Zoom Presentation:

Politics in America – The 2020 Election

Mr. Lefkin will share his insights and analysis on the Democratic primaries and nomination through the election of the President, House and Senate in November; including the factors likely to influence the result as well as the effect on the markets. He will also offer his analysis on the outcomes and consequences of the substantive matters that Congress and the President are likely to undertake in the coming year.

**Join us Tuesday, July 28, 2020 6:00 PM CST**

**Save this date: Tuesday July 28, 2020 6:00pm. CST**

**join us for a very special presentation**

Join Zoom Meeting  
<http://zoom.us/j/965052251017>  
pwd=STdPakN3ZysvaDJOMzBtQnRzRWg1UT09

Meeting ID: 965 0522 5101  
Password: 675149

Vacationing at Home This Summer: More Fun Than You Thought!

Many of us are not traveling this summer due to COVID 19. Even if we are planning a trip it's probably more local than long distance. So here are some fun ideas to make staying home a lot more fun.

**Drive In Movies**

Yes they are back! And more important than ever. What could be better than piling in the car, bringing a bucket of popcorn and cold drinks in a cooler and settling in for a first run movie at the local Drive In. Shades of "Happy Days". For a list of Drive Ins around Chicago go to <http://www.driveinmovie.com/search/all/chicago/>. Maybe you'll even see The Fonz!

**Pitch a Tent**

Not feeling safe about heading to campgrounds. Pitch a tent in your backyard. Grab the sleeping bags and make s'mores on the BBQ or fire pit (you can use the microwave in a pinch). Have everyone tell their favorite spooky story and sing the camp songs from the camp that isn't open this year.

**Host Backyard Olympics**

If you feel safe and you and your neighbors have been following guidelines. Set up a week of Olympic activities for adults and kids. Be creative and get out all your sports equipment and create your own events. Maybe it's badminton with sprinklers, or croquet on the front lawn. Have a soccer goal championship. It will keep your mind thinking and your body moving.

**Don't have a backyard? There are lots of ways to make staying home more fun.**

**Download historical walking tours**

Play tourist in your own city or town. We often never visit the places in our own city that tourists travel to visit. Download walking tours of neighborhoods and you'll be amazed at the interesting place you live.

**Virtually visit museums**

Almost all museums now have virtual tours of their buildings and collections. Visit your favorite local museum or travel around the world via your computer to see amazing art, sculpture, science and history exhibits. Here are a few to try:

- **The British Museum Interactive Tour.**  
<http://britishmuseum.withgoogle.com>

- **The J. Paul Getty Museum**  
<http://artsandculture.google.com/partner/the-j-paul-getty-museum?hl=en>

- **NASA** has a wonderful app that features an audio tour, GPS maps, augmented reality experiences and more.  
<http://spacecenter.org/app/>

- **Winchester Mystery House.** This 1884 house features spooky staircases to nowhere and bricked up doors. Perfect for a rainy afternoon. <http://winchestermysteryhouse.com/video-tour/>

**Whatever you decide to do, please follow all health guidelines and stay safe.**

THE WELLNESS CORNER

Gardening is Trending Amid COVID 19

Gardening is becoming one of the most popular things to do as more people have stayed at home this past spring and summer. One of our colleagues, who has always gardened, found this to be true when she went to one of her favorite nurseries in late spring only to find most everything already wiped out.

"I've never seen so many first time gardeners," said the owner. "You can tell them by the questions they ask! Even people from the city showed up, wanting to know how to grow herbs and tomatoes in their apartments."

**Here are some of the joys and benefits of tending a garden\*:**

**It can reduce stress.** Even tending plants in an apartment window can bring a sense of peace and comfort and reduce anxiety.

**It's great physical activity.** Digging, planting, weeding means you're getting lots of physical activity that promotes heart health and lowers blood pressure.

**Gardening means fun family time.** Gardening is something the whole family can join in. For children, exposure to dirt actually has many health benefits like reducing allergies.

**It boosts your Vitamin D.** The sun is the best source of vitamin D which benefits bones.

**It provides a sense of accomplishment.** Many of us don't see the results of work or other projects for a long time. But gardening can bring about a sense of accomplishment quickly. We see the beds cleared, the plants go in and the weeds come out. It's visual and satisfying.

**So whether you have an acres of land or a window in an apartment, gardening may be just the thing you need to de-stress and have fun. Just remember to wear sunscreen!**

\* <http://healthtalk.unchealthcare.org/health-benefits-of-gardening/>

BOOK OF THE MONTH

**Mrs. Greenham's Plows Ahead: Five Steps to the Drop Dead Gorgeous Garden of Your Dreams.**  
Cassandra Dana

**Mrs. Greenham's Plows Ahead: Five Steps to the Drop Dead Gorgeous Garden of Your Dreams.**  
Cassandra Dana

Dana was an amateur gardener and comedian who's wonderful, practical, funny advice on gardening is loved by experts and amateurs alike. You can't go wrong with her advice.

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- Insurance Solutions
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- Estate Planning
- Tax Planning

Our Concierge Services

To help our clients meet their financial objectives, Mappa Wealth Management offers you, a full array of concierge services. These professionals complement the broad range of financial services that Mappa Wealth Management provides.



\*Offered through Quorum Federal Credit Union. Working with MWM for over 18 years

Contact us for more information about our concierge services  
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Website: [www.mappawm.com](http://www.mappawm.com)

M A P P A WEALTH MANAGEMENT  
THE BEST OF BOTH WORLDS...

A Truly Powerful Partnership for Our Clients

Mappa Wealth Management is your long term partner for navigating financial and life decisions. We help you achieve the best life possible and work with you to make this happen.

- We bring clarity to complex financial concepts by taking time to explain our approach
- We help make sure you're financially prepared for the challenges that may be ahead
- Committed to integrity and transparency, as fiduciaries we take pride in upholding the highest ethical standards
- Our clients' best interests are always our number one concern

Personal Service along with National Resources

When you choose Mappa Wealth Management you choose a firm that offers you highly personalized services and the benefits of a powerful national partnership through Woodbury Financial, a network of some of the top independent financial firms in the nation.

You get:

- Highly personalized service and support from an experienced advisor who is a member of your community and understands your needs
- A broad array of national resources to help develop creative solutions to your financial needs

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