

September 2021

Hello Joe,

This month, my newsletter explores the following topics:

- [What to do with an inherited IRA](#)
- [Your home insurance might not cover everything](#)
- [Tips to protect your retirement accounts from hackers](#)
- [Ways Buffett's frugal habits can save you money](#)
- [How long to keep tax records](#)

It's never too early to start thinking about the year end, so please contact me if you would like to discuss your finances.

Sincerely,
LANNY LEVIN, CLU®, ChFC®
President



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I Inherited An IRA. Now What?

Here's what you should consider if you inherit money in either a traditional or a Roth IRA. Things can go wrong if you don't follow the rules.

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Your Home Insurance Might Not Cover All You Think It Does

When they go to file a claim, many homeowners are shocked to find out their policy excludes the type of damage they suffered. Will you be out of luck when you need help? Not if you know what specific coverage to ask for.

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10 Tips For Protecting Your Retirement Accounts From Hackers

A retirement account is often thought of as one of the most secure places to keep your money. In most cases, this is true. However, as we move further into the electronic age, retirement accounts are coming under threat from a new source: cyberattacks.

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9 Ways Warren Buffett's Frugal Habits Can Save You Money

He might have billions of dollars to his name, but unlike other celebrities and financial gurus, Warren Buffett prefers to live life simply. Here are nine ways Buffett's frugality can help you save and spend wisely.

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How Long To Keep Tax Records: Can You Ever Throw Them Away?

The general rule is to keep your tax records for three years, but there are several important exceptions for when you might need to keep your tax records for a longer period as a taxpayer. Read on to learn what they are.

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