

May 2020

Hello Joe,

I hope you're continuing to stay safe. Here are the articles for this month.

- [Estate planning is essential during the pandemic](#)
- [Eight reasons to prioritize an emergency fund](#)
- [Booking travel less risky than you think](#)
- [15 fall scenarios for education](#)
- [What happens when you skip mandatory IRA distributions](#)

Please contact me if you would like to discuss your finances.

Sincerely,
LANNY LEVIN, CLU®, ChFC®
President



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Estate Planning, Including A Medical Power Of Attorney, Is Essential During The Pandemic

The coronavirus pandemic is changing priorities for many people, and estate planning should be moving quickly near the top. If you don't have a full estate plan in place and up-to-date, now is the time to have it squared away as best you can.

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8 Reasons To Make An Emergency Fund A Priority

It's always worth it to make sure your emergency savings are up to snuff. There are many reasons why you need to fund your emergency savings. Here are eight.

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It's Less Risky To Book Future Travel Right Now Than You Might Think

The Covid-19 pandemic has put all but essential travel on hold, and no one can yet answer when we'll be free to go away again. But should we be planning future travel now?

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15 Fall Scenarios For Education

It's difficult to imagine higher education facing a more intense set of challenges than what we are seeing because of the COVID-19 pandemic. Here are 15 scenarios for the fall that we think schools will be considering.

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Skipping A Mandatory Distribution From Your IRA? Everything You Need To Know

This year, the coronavirus relief law is letting savers bypass mandatory withdrawals from their retirement accounts. While that's good news, it's still generating plenty of questions from account holders. Here are a few common questions and answers on how this required minimum distribution waiver works.

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