

July 2020

Hello Joe,

This month, Money Matters explores the following topics.

- [The COVID-19 essential estate planning “go package”](#)
- [Six rules from a millionaire who retired at 35](#)
- [Get more college financial aid during the crisis](#)
- [A great year for a Roth conversion](#)

As always, please contact me if I can help you with your finances.

Sincerely,  
**LANNY LEVIN, CLU®, ChFC®**  
President



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[lanny\\_levin@levinagency.com](mailto:lanny_levin@levinagency.com)



(847) 863-2860



[Website](#)

## The COVID-19 Essential Estate Planning “Go Package”

An estate plan doesn't do much good when key people don't know about it or have access to key documents and information. To avoid problems, especially during this pandemic, you should put together a “go package” of essential estate plan items and have the package readily available.

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## Millionaire Who Saved 70% Of His Income And Retired At 35: ‘We Should All Live By These 6 Basic Principles’

In 2016, Steve Adcock accumulated close to \$1 million in savings and quit his six-figure job in software development and retired at 35. Not everyone will be able to retire in their 30s, but achieving financial independence is within grasp for many. No one wants to be broke for the rest of their lives, so even if the goal isn't to retire early, Steve advises all to live by these six basic principles to build wealth.

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## How To Get More College Financial Aid During The Coronavirus Crisis

The pandemic may have derailed your plans for making higher ed affordable, but help is available.

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## A Great Year For A Roth Conversion

With the waiver of required minimum distributions in 2020, it may be a great year to consider converting a Traditional IRA to a Roth IRA. What are the benefits to consider and how much should you convert?

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President



[lanny\\_levin@levinagency.com](mailto:lanny_levin@levinagency.com)



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2020-104541 Exp. 7/20

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5141 Cote du Rhone Way, Sarasota, FL 34238

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