

2020

MAPPA WEALTH MANAGEMENT NEWS AND VIEWS



January 2020

Volume 3, Issue 1

In This Issue

Welcome To 2020

How To Make The Tax Code Work For You

Welcome To The Wellness Corner

Brett Gardiner: Believing In Giving Back

Think You're Insured For All Medical Situations? Think Again

Mark Mappa: New Podcast Interview

Events For 2020

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

WELCOME TO 2020

Mappa Wealth Management

Welcome to 2020

It's a New Year and all of us at Mappa Wealth Management want to wish you and your families a very healthy and happy 2020. The relationships we have with our clients is truly special and we want to thank you again for trusting us to help you reach your financial goals.

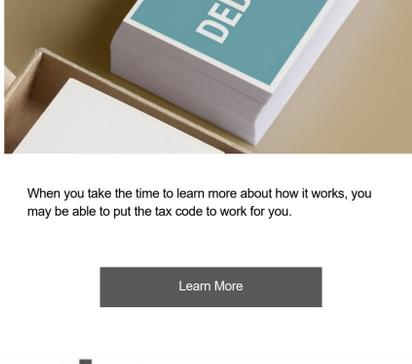
Over the course of this year, we will be hosting a series of educational and social events. Please check our bulletin board and website for the dates. More information will be posted as we make final decisions.

These events are one way we can show how we value our relationship with you.

Many of us make New Year's resolutions about getting healthier. To help us all keep that resolution during the year, we are introducing a new feature in this newsletter, The Wellness Corner. Each month we will feature a topic and a link to an article about exercise, meditation, healthy eating, etc. We hope you find it both helpful and interesting.

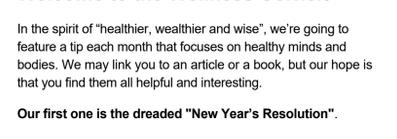
Again, thank you for your trust in us and we wish you much joy in 2020.

How to Make the Tax Code Work for You



When you take the time to learn more about how it works, you may be able to put the tax code to work for you.

[Learn More](#)



Welcome to the Wellness Corner.

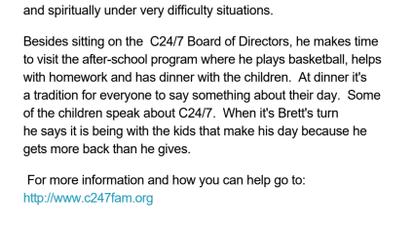
In the spirit of "healthier, wealthier and wise", we're going to feature a tip each month that focuses on healthy minds and bodies. We may link you to an article or a book, but our hope is that you find them all helpful and interesting.

Our first one is the dreaded "New Year's Resolution".

At the beginning of the new year many of us resolve to eat healthier and lose weight. But that often means following a diet that eliminates foods we really like. What if you could eat healthier, not eliminate any foods and still lose weight? Not just lose it, but maintain the weight loss. No, it's not a fat diet. It's about *portion control*, something Americans have a hard time observing. Instead of a diet, it's a way of losing weight, keeping it off, eating healthier while still enjoying foods we like.

Check out this article from New York Times health columnist Jane Brody on portion control.

<http://www.nytimes.com/2019/01/28/well/eat/diet-weight-portion-control.html>



Brett Gardiner is a husband, father, financial advisor and a believer in giving back. Over the last few years he has been involved with C24/7 – *Father's Arms Ministries*, a charity whose mission is dedicated to improving the lives of children and young adults in the North of Howard neighborhood. They provide the tools, security and environment to thrive economically, socially and spiritually under very difficulty situations.

Besides sitting on the C24/7 Board of Directors, he makes time to visit the after-school program where he plays basketball, helps with homework and has dinner with the children. At dinner it's a tradition for everyone to say something about their day. Some of the children speak about C24/7. When it's Brett's turn he says it is being with the kids that make his day because he gets more back than he gives.

For more information and how you can help go to:
<http://www.c247iam.org>

Think You're Insured for all Medical Situations? Maybe You Should Think Again.

Most of us have medical insurance whether it is from a private provider, Medicare or Medicaid. If we get sick we're covered, right? Maybe not. There may be exclusions or other limits. Then there is the issue of long term care, as we grow older, medical issues and costs may affect your retirement plans. Long term care insurance may or may not fit into your plans. In an ever changing and ever more complex medical world, you may need to rethink your insurance planning.

What if life throws you a curve ball?

- Even young people can get cancer or have strokes. Your existing medical coverage may not cover all your expenses. How will you pay your bills?
- Hospitals often send patients home within days, leaving you to arrange nursing care; how will you take care of home nursing costs?
- Your recovery from surgery may take much longer than you thought; how will you manage the extra medical care expenses once you are no longer hospitalized?

It could happen to you.

We all think it will never happen to us, but it could. However, there is good news. According to Kevin Smith, insurance professional and one of Mappa Wealth Management's concierge partners, there are distinct insurance products that can address these situations.

Recovery Care or Short Term Care Insurance

This is an affordable medical care insurance policy that typically covers you for up to two years for in-home help. They start at day 1 and are triggered by a doctor. Less expensive than long-term care policies.

Home Care Program

This type of policy provides for in-home care for up to one year. It helps with the expenses that occur when a patient needs help to stay at home. These policies are very inexpensive and may also be able to be obtained by people who are older than the typical cut off age for long-term care insurance.

Critical Illness Care

A critical illness can occur at any time and at any age. Cancer, heart disease, or strokes can crash your finances. Critical care coverage pays you a lump sum, as soon as you are diagnosed, to help cover the costs incurred when these illnesses strike.

These are important issues, please call us to discuss how we can help you mitigate the costs of an unplanned medical event.

Listen to Mark Mappa's interview about his book, *Cash Flow Is King*, on the Seeking Alpha website.

To listen click on the link to the podcast:

<http://soundcloud.com/user-301284526-840797/mark-mappa-maintains-cash-flow-is-king-seeking-alpha-podcast-12-12-19>



BULLETIN BOARD

MWM Events and Firm News.

Events For 2020

Mappa Wealth Management is planning for a year of interesting and informative educational events as well as fun social evenings. Check here and on our website for more information about upcoming events.

Save-the-Date

Tuesday, January 28
Town Hall and Market Update

Additional events planned for 2020

April 7th: Educational Event
June 11th: Social Event

July 28th: Post Democratic Convention Update
September: NFL Opener Viewing Party
November 5th: Educational Event
December 3rd: Client Holiday Party

For additional information visit our Website: www.mappawm.com or contact: Tanya Widner 847-262-3032
tanya@mappawm.com

Your Team of Financial Professionals

 Mark A. Mappa, President MSFS, CFP®, ChFC, CLU, RFC, CFS, CIS, CES 2700 Patriot Blvd, Suite 250, Glenview, IL 60026 847-262-3031 mark@mappawm.com	 Brett Gardiner, Private Wealth Manager 2700 Patriot Blvd, Suite 250, Glenview, IL 60026 847-852-4283 M: 847-712-7388 brett@mappawm.com	 Steven J. Wilhusen, Financial Advisor, CLU, ChFC 401 N. Michigan Ave., Suite 1200, Chicago, IL 60611 312-805-7869 steve@mappawm.com
---	---	---

We Offer Personalized Strategies in:

- Investment Management
- Retirement Planning
- Wealth Management
- Insurance Solutions
- Comprehensive Financial Planning
- 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.



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

Contact us for more information about our concierge services
Phone: 847-262-3030
Email: info@mappawm.com
Website: www.mappawm.com

MAPPA 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 service 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

info@mappawm.com
847-262-3030

Mappa Wealth Management
<http://www.mappawm.com/>



Securities and investment advisory services offered through Woodbury Financial Services, Inc. (WFS), member FINRA/SIPC. WFS is separately owned and other entities and/or marketing names, products or services referenced here are independent of WFS. This informational email is an advertisement and you may opt out of receiving future emails. To opt out, please click the "Unsubscribe" link below. This message and any attachments contain information, which may be confidential and/or privileged, and is intended for use only by the intended recipient. Any review, copying, distribution or use of this transmission is strictly prohibited. If you have received this transmission in error, please (1) notify the sender immediately and (ii) destroy all copies of this message. Mappa Wealth Management 847-262-3030 2700 Patriot Boulevard Glenview, IL 60026

[Unsubscribe](#)