

March 2024

Hello Joe,

This month, my newsletter explores the following topics:

- [Key IRS tax changes for this tax season](#)
- [How to protect yourself from tax identity theft](#)
- [Six habits to reset to sell your home](#)
- [Ex-Goldman recruiter's best advice for negotiating salaries](#)
- [All workers are confused about workplace rules](#)
- [Age-proofing your career against rising workplace ageism](#)

Factors as diverse as AI, geopolitical risk, and domestic policies influence financial strategies and outcomes. Please don't hesitate to contact me if I can help you decide how they might affect your financial decision-making.

Sincerely,

**LANNY LEVIN, CLU®, ChFC®**

President



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## Tax Season Is Here: Big IRS Tax Changes To Know Before You File

Tax deductions, tax credit amounts, and some tax laws have changed since you filed your last federal income tax return. They may affect your tax bill.

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## Tax Identity Theft 'Continues To Be A Huge Problem,' Expert Says. Here's How To Protect Yourself

Tax-related identity theft happens when criminals use your personal information to file a return in your name and claim your refund. Victims are waiting an average of almost 19 months for the IRS to process their returns and issue refunds, the National Taxpayer Advocate reported.

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## 6 Outdated Habits To Reset If You Hope To Sell Your Home This Year

Resetting outdated habits is crucial for home sellers aiming for success in today's market. Real estate professionals highlight the need to abandon old tactics, emphasizing strategies that align with current buyer expectations and market dynamics to secure the best deal.

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## The Salary Negotiation Trick That Works 'Time And Time Again,' According To An Ex-Goldman Sachs Recruiter

A simple question about what differentiates candidates at varying salary levels can unlock insights into an employer's value system.

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## Workers Of All Generations Agree On One Thing: They Have No Idea What The Right Rules At Work Are Anymore

In today's evolving work environment, 86% of knowledge workers feel lost amidst shifting workplace norms since the pandemic, with a Harris Poll revealing confusion across all generations about what's acceptable at work.

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## How To Age-Proof Your Career As Workplace Ageism Increases

Diversifying your networking, staying on top of advances (tech and otherwise) and sharing what you know can help protect you against age discrimination.

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