

September 2023

Hello Joe,

This month, my newsletter explores the following topics:

- [Retirement's longer lifespans and changing needs](#)
- [Four housing market myths hurting buyers and sellers](#)
- [Big retirement account changes you haven't heard about](#)
- [The ten-year rule for inherited IRAs](#)

Fall reminds us that year-end is not that far off. Please contact me if you'd like to get a head start on preparations to make 2024 a successful year for you.

Sincerely,
LANNY LEVIN, CLU®, ChFC®
President



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The Future Of Retirement: Longer Lifespans And Changing Needs

Many disruptive factors will impact retirement in the future. Thus, the time for workers to start preparing to deal with these disruptive factors is now. Here are some potential solutions to help in that process.

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Stop Believin'! 4 Housing Market Myths Hurting Today's Buyers And Sellers

Some of the supposed housing issues that are coming up time and again aren't true. Here are the four biggest myths about the current housing market and why experts say they're wrong.

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3 Big Retirement Account Changes You Haven't Heard About

Congress passed a slew of new retirement account changes recently. And three of them are worth singling out for how they may be able to help your wallet.

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IRS 10-Year Rule For Inherited IRAs: Kiplinger Tax Letter

The SECURE Act, which was passed in 2019, made some significant changes to the rules for inherited IRAs, including the 10-year rule. What is it, and what are the exceptions to it?

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