STRATEFI WEALTH MANAGEMENT

This is our first full month of spring and we have been hard at work finding new tools and strategies to help us deliver even more value-added services! This month's highlights:

- Our next webinar on reverse mortgages will be on Wednesday, May 17th at noon! Even if you can't attend live, **register for the recording >**
- When was the last time you reviewed your estate plan? Use our fillable Estate Planning Organizer to help you **keep track of your estate >**

Beyond that, we're highlighting a few of our favorite resources and articles from the month of April below.

RESOURCES

Social Security's Benefits Statement Mailing

Whether you're in your early 60s and closing in on retirement, in your mid-20s with decades to go or somewhere in between, you should be aware of this important retirement planning resource from the Social Security Administration (SSA)

Read Here

Minimize Taxes with Estate Planning & Gifting

Gifting can be a beneficial part of estate planning. It allows you to transfer assets to family members, friends, and charities while potentially reducing the overall tax burden on your estate.

Read Here

9 Steps to Raising Money-Smart Kids

It's Financial Literacy Month and one way to help our children become financially literate is by teaching them how to save and manage money.

Read Here

Choosing Beneficiaries for Your Retirement Account

Whom you choose as a beneficiary of your retirement accounts, and how you designate each beneficiary, can have a significant impact on your family.

Read Here

Cyber Intelligence Today

An LPL issue with updates on ransomware, phishing, and awareness.

Read Here

ON THE WEBSITE

Read More Blog Posts

ACCOUNT VIEW 2.0

Don't have access yet? Please request your activation link here and be sure to include your name in the request.

Request Activation Now

LIFE COACHING

Life coaching is the process of helping someone find the path between where they are **now** and **where they want to be**. We've partnered with Coach360 to provide you with a way to connect with coaches covering various life topics, including but not limited to retirement, empty nesting, relationships, and more. For the coaches, the first introductory meeting is free. After that, if you want to set up additional sessions, you can work with the coach on pricing. You can mention to the coach that you accessed their information through Coach360.

Click here for the sign-up guide, a step-by-step document with screenshots to help follow along:

Sign-Up Guide

YOUR FRIENDS & FAMILY

We provide a value-added service for your friends, family members, and colleagues. **If they are important to you, they are important to us.**

We're happy to be a sounding board for their financial concerns, and utilize our over 50 years of combined experience to help.

Please feel free to send them our contact details or you can give us their info and we'll be happy to schedule an introductory meeting.

JUST FOR FUN

Romantic Chicken with Artichokes & Mushrooms

Easy, moist, flavorful and aromatic — the white wine, artichokes and mushrooms make this chicken dish the way to anyone's heart! Delicious when served with buttered noodles and fresh greens.

Click Here for the Recipe

As always, thank you for allowing us to be part of your financial journey

All the best,
Your StrateFi Wealth Management Team
Jason, Merrick, and Kim

Book An Appointment With:

JASON & MERRICK (Joint Meeting)

JASON | MERRICK | KIM

You can Also Text

Jason: 775-204-2219 **Merrick**: 949-997-1886 **Kim**: 949-997-1868

Note: Texting services are for business purposes only.

STRATEFI WEALTH MANAGEMENT

Finding the Way Together

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