

July 2021

Hello Joe,

This month, my newsletter explores the following topics:

- [Is mortgage refinancing right for you?](#)
- [Two essential strategies for taking your RMDs](#)
- [The guide to selling your home](#)
- [Protect yourself against new ID-theft schemes](#)
- [Inflation: what it is and why it matters](#)

Please contact me if you would like to discuss your finances.

Sincerely,
LANNY LEVIN, CLU®, ChFC®
President



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Is Mortgage Refinancing Right For You?

Low mortgage rates have helped fuel the competitive housing market, but for some homeowners, they offer an opportunity to save money through mortgage refinancing. For those on the fence about refinancing, there are several factors to consider.

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2 Essential Strategies For Taking Your RMDs

Whether you need to take required minimum distributions to live or find them to be a nuisance, here are some tips to make the most of withdrawing these funds.

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The Guide To Selling Your Home

Whether you're ready to move into a bigger house for your growing family, downsize to a smaller place or relocate to a different part of the country for work, the process of selling a house is one that requires work. From the point you decide to move to the closing table, here's what you need to know about selling your home.

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Protect Yourself Against New ID-Theft Schemes

Throughout the past decade, consumers have been rocked by one massive data breach after another. Crooks are using more-sophisticated tricks to steal your data. It's time to improve your armor.

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Inflation: What It Is And Why It Matters

Inflation occurs when the price of goods and services increases over time. Because inflation affects the prices of everything around us, keeping tabs on how the rate of inflation is trending is important when making decisions about your money now, and in the future.

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