

February 2024

Hello Joe,

This month, my newsletter explores the following topics:

- [Five best financial moves to make in 2024](#)
- [Seven money-saving lessons from frugal parents](#)
- [Estate planning challenges for retiree cohabitation](#)
- [The current value of investing in rental properties](#)
- [Seven job interview phrases you should never use](#)
- [Overcoming the 'too old to start over' myth](#)

Financial decisions are being influenced by more factors than ever, many of them seemingly contradictory. Please don't hesitate to contact me if I can help you assess the best strategies for your financial future.

Sincerely,
LANNY LEVIN, CLU®, ChFC®
President



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lanny_levin@levinagency.com



(847) 863-2860



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2024 To-Do List: Five Best Financial Moves To Make

Do these five things to shore up your financial plan and be better prepared and organized for 2024.

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I Grew Up With Frugal Parents: 7 Valuable Lessons They Taught Me About Saving Money

Here are the seven crucial money-saving lessons one individual gained from a childhood with frugal parents, from the importance of distinguishing needs from wants to the wisdom of delayed gratification and the security of an emergency fund.

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Estate Planning And The Legal Quirks Of Retiree Cohabitation

Creating an estate plan for an unmarried couple is already challenging, but when the people in a cohabitating couple are in their golden years, it's especially tricky.

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Is It Worth Buying A House As A Rental Property Right Now?

Considering buying a rental property? Here are the factors to weigh before making this investment, starting with the current housing market conditions and financing options for the down payment.

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I've Helped People Land Jobs At Google And Microsoft. 7 Job Interview Phrases You Should Never Use—What To Say Instead

Here are seven interview phrases that destroy your chances of landing a job and what to say instead.

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Being Too Old To Start Over Is An 'Outdated' Concept, Says Career Coach—How To Navigate A Professional Reset

The notion of being 'too old' for a career change is becoming obsolete. Here are valuable insights into navigating a professional reset, regardless of your age.

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President



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Website

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5141 Cote du Rhone Way, Sarasota, FL 34238

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