

December 2020

Hello Joe,

This month, my newsletter explores the following topics:

- [How to survive an IRS tax audit](#)
- [Emergency financial to-go kit: what to have](#)
- [2021 IRS tax rates, deduction amounts, and more](#)
- [10 common myths about estate planning](#)
- [How mortgage brokers can save you time & money](#)

I hope you're enjoying the holiday season. As always, please contact me if you would like to discuss your finances.

Sincerely,
LANNY LEVIN, CLU®, ChFC®
President



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How To Survive An IRS Tax Audit

Receiving notice that you're being audited by the IRS may send you spiraling into a panic. Take a deep breath. Here are strategies taxpayers can use to navigate the system, separate real IRS audits from scams and maximize their chances of a favorable decision.

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19 Things You Should Have In Your Emergency Financial To-Go Kit

If disaster strikes, do you have your important financial documents ready to go in case you need to leave your home in a hurry? Here's what you'll need.

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IRS Releases 2021 Tax Rates, Standard Deduction Amounts And More

The Internal Revenue Service (IRS) has announced the annual inflation adjustments for the tax year 2021, including tax rate schedules, tax tables and cost-of-living adjustments.

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10 Common Myths About Estate Planning

Do you find estate planning confusing? Estate planning is one of the areas of financial planning with the most widespread confusion that can lead to costly mistakes. Here are ten estate planning myths we hear most often.

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How A Mortgage Broker Can Save You Time And Money

A home is the biggest, most exciting purchase most people will ever make. It might be the most nerve-wracking, too, because obtaining a mortgage and closing the loan can be a lengthy, complicated process, especially for a first-time homebuyer. This is where a mortgage broker can help.

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