Connections | June 2025

Managing your personal wealth isn't just about the dollars and cents. It's about connecting with what matters to you. Across all generations from life changes through life stages, Mesirow is here to help. That's why every quarter we write content on topics that we hope are relevant and insightful for you.

Rethinking retirement: Myths that could derail your future plans

Experience is often a good teacher. However, when approaching retirement, watching the path of others before you may not provide adequate guidance. Retirement has changed greatly in recent decades and yours may be different from what your parents and grandparents experienced. As a result, your preparation and expectations may need to change to be ready for a 21st century retirement.

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Mid-year financial checkup: Are you on track to meet your 2025 goals?

This is a great time to review the goals that you set at the beginning of the year to ensure you are on track. It is important to reflect on your financial goals, investment strategies and risk tolerance to ensure that you are well-positioned for the remainder of the year and beyond.

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Leaving your IRA to a Charitable Remainder Unitrust can benefit your heirs and your preferred charity

If you have substantial assets in your IRA (or other qualified plan account), leaving this asset to your children or other family members can create many headaches. One solution to consider is leaving your IRA to a testamentary Charitable Remainder Unitrust (CRUT) for the benefit of your heirs and, ultimately, your preferred charity.

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Wedding planning: Critical financial tips

It's a fact; couples in the US are marrying later in life, especially college educated professionals. As a result, both partners have often begun to save, invest and accumulate assets. Premarital financial planning has therefore become extremely important.

And, the awkward question must be asked: “How can we protect our assets when entering into marriage without tainting the romance of engagement?”

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Tools you can use

EState planning fact sheet

Having an estate plan ensures that your legacy will live on. But these decisions can be intimidating, existing at a nexus of numerous investment vehicles, confusing tax regulations, opaque insurance policies and legal contracts. Let us help you, using our new estate planning resources. Reach out to your advisor to learn more.

Download

Legacy Checklist

This checklist is designed to help guide you through a variety of tasks when you lose a loved one, but your advisor is also always there to help. Download to learn more and reach out to your wealth advisor with any questions.

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