

Connections | September 2022

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, Mesriow is here to help. That's why every quarter we write content on topics that we hope are relevant and insightful for you.

Retirement Lifestyle

Your life in retirement has the potential to exceed the life of your career. Think about that. That's very different than the generations before us. Having a plan—both a financial plan and a plan for how you plan to spend the next 30+ years—has never been more important. People with a plan are, not surprisingly, significantly more satisfied in retirement.

[MORE](#)

Tax-Advantaged Investing

As stocks dip this year, some investors are taking advantage of the market volatility by converting their traditional pre-tax IRAs to a Roth IRA. Why? Because the decline in the current market value of the Traditional IRA means a reduced tax liability upon conversion

[MORE](#)

Planning and Advice

When it comes to meeting goals and staying on budget and on track to attain your financial objectives, financial planning is critical. Everyone has unique circumstances that must be considered when creating a comprehensive plan, and members of the LGBTQ community may have additional factors to consider when it comes to planning.

[MORE](#)

Retirement Planning

Some baby boomers are considering moving up their retirement dates but are faced with many variables to ponder such as having enough assets to live comfortably, how to maintain their lifestyle, and how to deal with healthcare. In this informative guide you will find four areas of focus to help you bring all those blurry potential outcomes into sharper relief.

[DOWNLOAD](#)

Tools you can use

SEC Investor Alert - Social Media and Investment Fraud

We have also included a link to an investor alert from the [SEC Investor Alert](#) highlighting 8 SEC regulations to prevent investors from being scammed and how scammers may exploit vulnerabilities.

Document locator

How easy is it for you or a family member to locate your most important documents in an emergency? Mesirow's [document locator](#) provides you with a simple way to log the location of all for your key documents.

Mesirow does not provide legal or tax advice. Past performance is not indicative of future results. The views expressed above are as of the date given, may change as market or other conditions change, and may differ from views express by other Mesirow associates. This is not a solicitation to buy or sell the securities mentioned. Do not use this information as the sole basis for investment decisions, it is not intended as advice designed to meet the particular needs of an individual investor. Information herein has been obtained from sources which Mesirow believes to be reliable, we do not guarantee its accuracy and such information may be incomplete and/or condensed. All opinions and estimates included herein are subject to change without notice. This communication may contain privileged and/or confidential information. It is intended solely for the use of the addressee. If you are not the intended recipient, you are strictly prohibited from disclosing, copying, distributing or using any of the information. If you receive this communication in error, please contact the sender immediately and destroy the material in its entirety, whether electronic or hard copy. This material is for informational purposes only and is not intended as an offer or solicitation with respect to the purchase or sale of any security.

Mesirow refers to Mesirow Financial Holdings, Inc. and its divisions, subsidiaries and affiliates. The Mesirow name and logo are registered service marks of Mesirow Financial Holdings, Inc. ©2026, Mesirow Financial Holdings, Inc. All rights reserved. Any opinions expressed are subject to change without notice. Past performance is not indicative of future results. Advisory Fees are described in Mesirow Financial Investment Management, Inc.'s Form ADV Part 2A. Advisory services offered through Mesirow Financial Investment Management, Inc. an SEC registered investment advisor. Securities offered by Mesirow Financial, Inc. member FINRA and SIPC.