

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, Mesirow 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.

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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

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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.

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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.

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