

Connections | December 2023

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.

Seven year-end planning tips

It is always important to review your financial plan every year to see if there are opportunities to make changes based on any life changes you or your family may have recently experienced. Depending on your unique situation, some of the tips in this article might make sense for you and your family.

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Three tips to plan for the 2026 "sunset" of the Tax Cuts and Jobs Act

The Tax Cuts and Jobs Act (TCJA) was signed into law on December 22, 2017. This legislation went into effect in 2018 and it impacted nearly every part of the tax code. However, one of its most unique features is its "sunset" in 2026, at which point most of the changes to the tax rules revert to their 2017 levels. Although 2026 is still more than two years away, there are a few strategies that you can use now to take advantage of the current rules before they lapse.

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Financial and lifestyle changes - Realities facing younger generations

Members of the Silent Generation, Baby Boomers and some of Generation X may now reflect on their life course and say "back in my day" when sharing financial wisdom with their family's youth. However, many people may not be aware of how much things have changed, thereby presenting a barrier to achieving common goals such as education, housing and having a family. Individuals in Generations Y (Millennials) and Z may be hit harder financially than those before them. Also, lifestyle goals and other accomplishments may take longer as individuals need more time to establish themselves. This article provides a few reasons why.

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Prepare. Plan. Protect - Wealth planning tips for business owners

Personal wealth planning is critical in all phases of your career and all stages of your business. Just as you are identifying short and long-term growth goals and strategies for the company, it is important to identify short and long-term personal financial goals and plans for you and your family. As there are also numerous risks to company ownership, we'd like to suggest a formula you can use to protect your financial future. Prepare. Plan. Protect.

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Tools you can use

Mesirow Mondays - Listen In

On the first Monday of every month, Mesirow Wealth Management thought leaders are featured on the WGN Radio 720 "Your Money Matters" show hosted by Jon Hansen. Listen to recent broadcasts about retirement and tax-advantaged strategies.

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Small Business Guide

If you are a business owner who is planning on selling your business now or in the future, our goal is to make your journey as efficient as possible. This brochure is designed to help you understand what's involved and to ask the right questions.

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