

Pat's Planning Corner



In this section, Patrick will share timely insights, ideas, and educational content in order to emphasize important components of financial planning and wealth structuring.

The Ins & Outs of Roth Conversions

You may have heard the term “Roth conversion” thrown around. The strategy has gained popularity amongst professionals over the last 24 months. So what is it?

Quite simply, a Roth conversion is a taxable event in which an individual converts a portion of or the entire balance of a pre-tax retirement account. The amount converted is taxable as income in the year the transaction occurs. The proceeds can then be re-invested in a Roth IRA, where the funds will receive tax-free treatment upon withdrawal.

But why add taxable income to your AGI if you are currently working and possibly in your peak earning years? Is it right for you?

[Read the full article here](#)



Liebman's Library

INSPIRED BY
A 30-YEAR TRADITION

In this section, Matt Liebman and Sam Liebman will share 1-2 articles or charts per month that caught their attention related to the Investment Markets.

Starting when Matt was in Elementary school, he would walk into his room and find newspaper or magazine articles about sports, politics, business, or markets that Sam had cut out for Matt to read. The tradition has continued for over 30 years.

Now the article flow goes in both directions and the articles are usually sent via text. For this month, we chose a Barron's article that focuses on the rather uneventful, non-exuberant manner in which stock markets keep grinding higher.



The stock market keeps hitting new highs in the most boring ways

Adventure. Excitement. The stock market doesn't seem to crave these things lately. Investors should hope it stays that way.

[Read More on Barron's](#)

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Each year, it is important for clients to have their Financial Advisor and Tax Professional work hand-in-hand, but this year could be even more critical depending on what tax changes are on the horizon.

Potential adjustments are an increased top individual federal income tax rate, long-term capital gains rate increases and the possibility that cost basis "step up" at death is removed.

Our recommendation is to **not wait until December** to have conversations about how to minimize tax both this year and in future years.

Accountants will be swarmed with clients looking for advice on how to best navigate these obstacles, so getting started earlier will allow you and your trusted advisors to formulate well-thought-out plans heading into 2022.

Operations Corner

WITH MONICA AND MICHELLE



It's been 6 months since we launched! IF there are large balances remaining in old Merrill accounts, please let us know and send an account statement via email by clicking the button below.

[Send a Statement](#)

Your Advisors in the News

RECENT MEDIA MENTIONS

Aaron was recently featured in a Financial Advisor IQ article discussing the benefits of having a younger advisor.

For him, it's all about longevity.

[Read the full feature](#)



How one breakaway RIA brought over more assets than it expected

Read Matt's article on his experience transitioning to an independent RIA model on InvestmentNews.com

[Read More](#)

Where to Invest \$1 Million Right Now

Matt was recently featured alongside four other investment experts in Barron's "Where to Invest \$1 Million Right Now" series. Click below to read Matt's recommendations.

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