



Pat's Planning Post



It's 2022! A new year brings changes to contribution limits and other important tax information. Feel free to reference and save the below tax guide.

[Get The Guide](#)



Liebman's Library

INSPIRED BY
A 30-YEAR TRADITION

In this section, which we call Liebman's Library, 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 January, we chose a **Wall Street Journal** article about the volatility and recent activity in the **SPAC (Special Purpose Acquisition Company) market**. As a firm, we do not automatically accept or reject investments based solely on their structure. In our opinion, the contents of the investment are far more important than the construction.

This article highlights the potential pitfalls for investors when they get too enamored with a new or popular investment structure without fully contemplating the risks.



The SPAC Ship Is Sinking. Investors Want Their Money Back.

[Read More on WSJ](#)



**Aaron's
Action Items**

This article from the **Wall Street Journal** calls attention to a few “action items” for the start of the year. It is critical to pay attention to what types of investment vehicles are held in non-retirement accounts. There can be major tax implications (as outlined in this **Wall Street Journal** article) for holding Mutual Funds in Joint accounts, Individual accounts, trust accounts, etc. This is why our team focuses on primarily using potentially more favorable investment vehicles (ETFs) in these types of accounts.

The action here is to not only review your investments and associated allocations that are not under the Amplus umbrella, but also the structure of the investment you are using.

Our Amplus portal even allows you to “link” these external accounts which would allow us to review them if you would like.

[Read More on WSJ](#)

Social Security Webinar with Elaine Simmons



SOCIAL SECURITY WITH

**ELAINE
SIMMONS**

FEBRUARY 10, 12:30 P.M.

[REGISTER](#)

On February 10, we will be co-hosting a webinar with Elaine Simmons, a vibrant nationally sought-after keynote speaker, on Social Security. She is known for her witty and entertaining presentations that explain complex Social Security laws and breaks them down in a manner that is easily understood by all.

Elaine draws on her almost 34 years of experience working all technical levels of the jobs at Social Security in the southeastern United States.

Elaine is hired by top financial service organizations and is often a guest on financial services radio programs. She regularly conducts continuing education events for financial advisors and CPA's.

Elaine has received high ratings as a keynote speaker at a National Association of Personal Financial Advisors Study Group Meeting.

This webinar will not be recorded, please register using the button below. This is one webinar you don't want to miss!

[Register For the Session](#)

Your Advisors In the News

Recent Media Mentions

FAs Weigh In: Biggest Opportunities and Challenges in 2022



Financial Advisor IQ reached out to advisors to ask, what are the biggest opportunities and challenges you expect to face this year? Read more on what Patrick anticipates for 2022.

[Read Article on Opportunities](#)

[Read Article on Challenges](#)

FAs Weigh In: Catering to Younger Investors

Are there differences in how advisors serve younger clients versus older ones? Read Aaron's take in this article by Financial Advisor IQ.

[Read the full article here](#)



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