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GreenLife Advisors

NEWSLETTER

v.3, February 15, 2024

DOLLAR$ & $ENSE

What I'm Working On

The Power of Incorporating Taxes into a Financial Plan

I use tax planning software to incorporate a client’s tax profile into my financial planning services. I’m excited to offer tax planning as part of my firm’s comprehensive financial planning because taxes impact virtually every aspect of one’s finances. A client’s tax return is a financial fingerprint: it’s entirely unique for that person, complete with valuable clues and information, all buried in dozens of pages and hundreds of numbers. Understanding the return equips me to have more valuable and actionable conversations with my clients. Additionally, I demystify the world of income taxes and help clients understand this vital piece of their unique financial picture.

Tax Planning Power

Click here to review examples of how I leverage a client's tax return in financial planning and investment strategies:

Read more

> *"In this world nothing can be said to be certain, except death and taxes." - Benjamin Franklin*

Market Indices

Year-to-date, as of February 14, 2024

Stocks:

Large Cap S&P 500, +4.16%

Small Cap Russell 2000, -1.81%

Technology NASDAQ, +4.91%

International MSCI EAFE, -0.83%

Bonds:

U.S. Aggregate AGG, -2.32%

Sources: FactSet; Dow Jones Market Data; S&P Dow Jones Indices; *ICE Data Services; Bloomberg Indices; MSCI and J.P. Morgan.*

What I've Enjoyed

This winter, I became a varsity high school fencing parent! Never having picked up an épée myself, I dove headfirst into the world of en garde alongside my son, Cole. As his season wrapped up, I couldn't help but reflect on the unique appeal of this elegant sport.

The lightning-fast attacks and parries of épée, where a single touch to the body scores a point, is certainly admirable. Cole was dedicated to improvement, drawn to the precision and discipline of épée, and thrived on the piste.

While the team scored the final point for this season, the lessons learned, the bonds forged, and the thrill of competition will no doubt stay with us.

Learn More

If you would like to learn more, please schedule a free consultation below.

Schedule

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