TAYLOR FINANCIAL GROUP, LLC
THE RIGHT PARTNER CAN MAKE ALL THE DIFFERENCE

January 13, 2020

The Week Ahead:

your weekly news & updates

Will you be my Galentine & Bring a Gal Pal?

Come enjoy an evening of
food, fun and empowerment at our
3rd Annual Women's Chat & Cooking Class
Wednesday, February 12, 2020

Bring a friend you think would enjoy this ladies night out & who might benefit from our services!

Click Here for More Information

****** This Event Is For Existing Clients & Their Guests Only ******

Debbie personally curates our newsletter which offers exclusive insights into events and happenings at Taylor Financial Group!

Click Here to Visit Our Website

Wealth Matters
Feature Podcast Of The Week

Each week we feature a podcast of Debbie's Wealth Matters radio show. Check out "Last Stage of Retirement" recorded on August 12th.

Click Here to Listen Now

SECURE ACT:

Long-established retirement account rules change

The SECURE Act

Provided by Taylor Financial Group, LLC

The Setting Every Community Up for Retirement Enhancement (SECURE) Act is now law. With it, comes some of the biggest changes to retirement savings law in recent years. While the new rules don't appear to amount to a massive upheaval, the SECURE Act will require a change in strategy for many Americans. For others, it....**read more**

How Does the SECURE Act Impact Your RMDs?

Provided by Taylor Financial Group, LLC

The SECURE Act, which went into effect Jan. 1, 2020, significantly changes the Required Minimum Distribution (RMD) requirements for inherited accounts. **Click here** for more on this as well as an **RMD calculator**, a **guide explaining the full impact** of The SECURE Act, and a **free webinar**.

CURRENT STATE OF THE MARKET

Weekly Market Commentary 01.13.2020

Published by The Carson Group

The U.S. employment report missed expectations, but it reinforced our view that the U.S. labor market remains strong. As shown in the accompanying chart, 145,000 new jobs were created, missing expectations of 160,000. Wages have risen 2.9% over the last year, falling below 3% for the first time since late 2018….**read more**

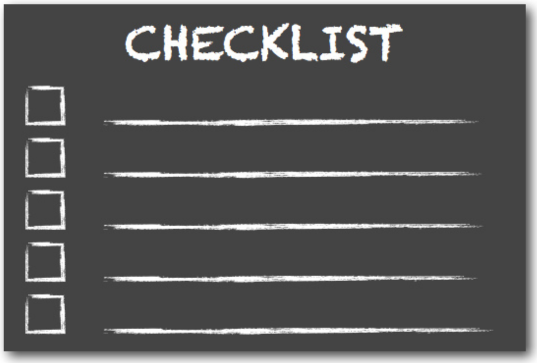
The Year Ahead: Market Factors That Could Affect Your Portfolio In 2020

Provided by Taylor Financial Group, LLC

Ringing in the new year signifies a fresh start for many. For the financial markets, though, hangovers from the previous year can color the outlook, as hitting the reset button on data, trends and issues — appealing though it may be — is not a viable option. As 2020 gets off the ground, investors can expect to continue finding comfort in favorable trends while dealing with frustration caused by….**read more**

RETIREMENT

2020 Retirement Calendar Checklist



Provided by Taylor Financial Group, LLC

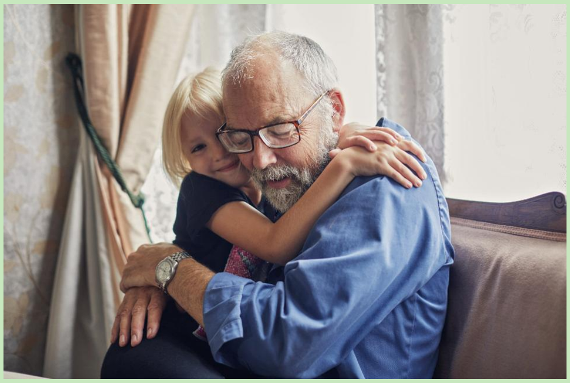
Your bulletin board guide to staying on track! Use this all inclusive checklist to track all the important financial and health care deadlines throughout the year. **Check it out here**!

3 Major Penalty Taxes That Could Diminish Your Retirement Savings

Provided by Taylor Financial Group, LLC

Many of the best retirement saving strategies use employer-sponsored retirement plans like a 401(k), or individual plans like an IRA or Roth IRA. These retirement savings vehicles provide credit protections, preferential tax treatment to the investments, and in some cases, sizable tax deductions for contributions....**read more**

SOCIAL SECURITY



Understanding The Basics Of Social Security Benefits For Surviving Spouses

Provided by Taylor Financial Group, LLC

Social Security is the primary retirement income source for many Americans – **for over 60% of them** it provides more than half of their retirement income. Security discussions often **focus on retirement security**, but a number of related benefits also deserve the spotlight, such as survivor benefits for a surviving spouse.... **read more**

"The man who says he is willing to meet you halfway is usually a poor judge of distance."

- Laurence J. Peter -

Tip of the Week

from the Weekly Economic Update

*When it comes to **naming an executor** for your estate, a **family member** or relative is **not your only option**. You can also name an **attorney** or a **corporate trustee** as your executor.*

Winter Workshops Are Coming!

Get ready to start planning for the New Year with

Coming Up

Tuesday, January 21st: Weeknight Workshop:

Debbie's newest offering "10 Financial and Tax Tips for the New Year!" We will also continue to bring you workshops on Retirement, Investing, Taxes...check back as we regularly add new dates!

Casual and interactive workshops are being offered as a COMPLIMENTARY community service, because Debbie Taylor and Taylor Financial Group, LLC believe in educating and empowering people to take charge of their future.

Click Here for Detailed Schedule

20 for 2020: Financial Planning, Investment and Tax Tips to Make the Most of the New Year – 7:00 pm @ Waldwick Public Library

Thursday, February 13th: Weeknight Workshop: Ready, Set, Retire! – 7:00 pm @ Westwood Public Library

Tuesday, February 18th: Weeknight Workshop: 20 for 2020: Financial Planning, Investment and Tax Tips to Make the Most of the New Year – 7:00 pm @ Franklin Lakes Public Library

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