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About Us

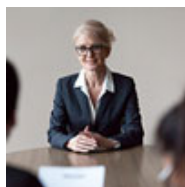
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Investor Alert: Tax Impact of Gyrating Markets

Investors have seen the values of their stock portfolios fluctuate significantly over the last year. If you trade stock in today's volatile markets, how will it affect your federal income taxes for the year? Here's what investors should know about reporting short-term and long-term capital gains and losses, including how to avoid the dreaded "wash sale" rule.

[Full Article](#)



Every Business Should Prevent Age Discrimination

According to the U.S. Equal Employment Opportunity Commission, about a quarter of discrimination lawsuits filed center on age discrimination. As people choose to work longer, the possibility of age discrimination occurring could grow, leading to costly litigation if the applicable laws are violated. Read on for tips on how to avoid running afoul of this important area of employment law.

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Navigating the SALT Deduction

If you itemize expenses on your federal tax return, one of the most popular deductions is for state and local tax (SALT) payments. These deductions can be significant in states with high income or property taxes (or both). Unfortunately, current tax law limits SALT deductions through 2025. How can you maximize your deductions for state and local property, income, and sales taxes?

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FAQs on LTC Insurance and Your Taxes

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Many people experience sticker shock when they need long-term care (LTC) services for themselves or a family member. Fortunately, you can purchase LTC insurance to help cover the costs. Here are some frequently asked questions about how LTC insurance works, when to sign up, when the benefits are tax-free and more.

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How Much FDIC Coverage Do You Have?

As you've no doubt heard, two regional banks recently collapsed, which has raised questions about Federal Deposit Insurance Corporation (FDIC) coverage. Many people wonder how much coverage is guaranteed under federal law — and whether they should maintain separate accounts at multiple banks. This article explains the protection that depositors have in U.S. institutions.

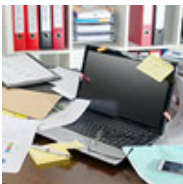
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Ways to Secure Your Estate Plan

Do you have a comprehensive, updated estate plan? Wills and trusts are vital tools to help preserve your wealth and transfer assets to your loved ones. You won't be around to explain or interpret your plan, so it's important to be as clear as possible when drafting documents. There are several strategies you can employ today to minimize disputes over your estate after your passing.

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Resist the Urge to Purge after Filing Your 2022 Tax Return

The mountain of paper and electronic records that's needed to support your tax return may include receipts, bank and investment account statements, K-1s, W-2s, and 1099s. How long do you need to save these records? Three years is the general rule. But don't be hasty: Failure to keep a paper trail for the information provided on your returns could lead to problems if you're audited.

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How to Figure Your Retirement Needs

Someday, you'll say good-bye to work and rigid schedules... and regular paychecks. With any luck, you'll piece together enough income from Social Security, pensions, savings, and investments to maintain a comfortable lifestyle. Or, instead of leaving it to chance, you can figure out right now how much you will need, and formulate a plan for getting it. Need help? Read on.

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Credit Cards in College: Not Just Another Click

College is a time when students learn about living independently. It can also be a time when they get into trouble with credit cards. Some of these blunders can result in long-term financial implications. There are some steps that parents (and students) can take to help ensure their children don't wind up with a mountain of credit card debt while they get an education.

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