



Pulse

what you need to read
by AALU

December 12, 2019

REMINDER:

IRS Notice - Dec. 31 deadline for most retirees to take required minimum distributions

[Read more >>](#)

Wealth Transfer

A photograph showing stacks of coins, a blue pen, and a silver pen on a surface.

A Strategy to Help Charitably Inclined Clients Maximize their Philanthropic Impact

While 80% of charitable donors own publicly traded appreciated securities, only 19% contribute these assets to charity. In this Wealth Management article, Tony Oommen explores strategies to help clients maximize their philanthropic impact with donations of

non-cash assets.

[Read more >>](#)

Assets Under Management



Try a Kiddie Roth IRA for the Holidays

In this ThinkAdvisor article, two law professors explain why Kiddie Roth IRAs are a flexible, powerful, and often overlooked tool for helping children or grandchildren begin their savings.

[Read more >>](#)

Have Social Security's Actuarial Adjustments Kept Up with Reality?

In this ThinkAdvisor piece, Ginger Szala overviews a research paper authored by the Center for Retirement Research at Boston College. The paper concludes that Social Security actuarial adjustments have not accounted for important market factors, requiring clients to conduct additional planning to ensure they save enough for retirement.

[Read more >>](#)



Practice Management and Marketing

Is a Chief Operating Officer Right for Your Practice?

This Wealth Management piece builds upon a white paper that explores the benefits of professional management for RIAs. The article provides a framework for advisors to understand whether a Chief Operating Officer is worth the cost.

[Read more >>](#)

Growing Your Firm with Online Client Meetings

Jud Mackrill, chief marketing officer of Carson Group, offers insight into the value of offering clients digital solutions to traditional client meetings. Doing so may help capture new clients, as 40% of affluent consumers chose a digitally-led firm, when changing their wealth management firm in the last two years.

[Read more >>](#)



Business Insurance and Employee Benefits

Planning For 2020: Year-End Deadlines and Considerations for Employee Retirement

This article highlights key deadlines and considerations for retirement, health, and welfare benefit plans that employers should be aware of as the end of year approaches.

[Read more >>](#)

Employee Incentives and Equity Compensation Arrangements

This article is the second in a series by Eric Duffee. It provides a high-level summary of the most typical equity compensation alternatives for firms considering equity-based compensation for key employees.

[Read more >>](#)

Tax and Regulatory Development



Raymond Farmer Tapped to Lead NAIC in 2020

The National Association of Insurance Commissioners announced that Raymond Farmer, the South Carolina Insurance Commissioner, will lead the organization in 2020. Farmer replaces outgoing President Eric Cioppa, the Maine Insurance Superintendent.

[Read more >>](#)

Upcoming Events

- **GAMA LAMP** | March 22-25, 2020 | Orlando, FL | [Register Here](#)
 - **TRANSFORM 2020** | April 26-28, 2020 | Marriott Marquis | Washington, D.C. | [Register Today](#)
-

Ask Us Anything

Have a question or comment? Just reply to this email and send it our way.

Suggestions on content? We'd love to hear that too! Reply to this email to let us know your thoughts.

[Twitter](#) [Facebook](#) [LinkedIn](#)

We've updated our login process! If you haven't done so already, click [here](#) to reset your password by selecting *Forgot password*.

Questions?

Contact support@aalu.org

Copyright © 2019, All rights reserved.

Our mailing address is:

AALU
11921 Freedom Drive

Suite 1100
Reston, Virginia 20190