



Pulse

what you need to read
by AALU

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Wealth Transfer

15 Questions to Ask Clients About Their Charitable Giving

In this *ThinkAdvisor* piece, Ken Nopar at the American Endowment Foundation provides a series of questions to discuss with clients before the peak giving season at year-end. These include when the client prefers to give, how he or she decides which organizations to support, and who is involved in the giving decisions.

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Is It Time To Review Your Succession Plan Documentation?

This case study shows how outdated buy-sell agreements, wills, and other planning tools can cause unintended consequences—even for businesses run by childhood friends trying to do right by their partners—providing a good reminder of the importance

of updating business succession plans.

[Read more >>](#)

Tax and Regulatory Development



IRS Ruling Could Require Earlier RMDs

Ed Slott explains why advisors should take heed to a recent IRS ruling on uncashed distribution checks because it may require clients to take required minimum distributions (RMDs) early.

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Ninth Circuit Decisions Overrule 35-Year Precedent in ERISA Arbitration Disputes

Holland & Knight counsel discusses the 9th Circuit Court's decision that overturned 35 years of precedent in ERISA arbitration disputes, and explains the key considerations for advisors.

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Business Insurance and Employee Benefits



PSCA Study Shows 40% Increase In Plan Sponsors Offering NQDC Plans Primarily To Build Retirement Savings

The Plan Sponsor Council of America (PSCA) released the results of its recent survey of plan sponsors. Among the results, the PSCA noted that there has been a 40% increase in the number of firms offering NQDC plans with the primary goal of helping employees accumulate assets over the last three years.

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Assets Under Management



How S Corporation Owner-Employees Can Adopt An Accountable Plan To Preserve The Home Office And Other Business Expense Deductions

Under the TCJA, S-Corps owner-employees can use an “Accountable Plan” to minimize their tax bill. In this deep dive analysis, Jeffrey Levine explains the guidelines for these plans, provides examples of its benefits, and pitfalls to avoid.

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Practice Management and Marketing



Strategies for Effectively Prospecting Millennial Clients

This Wealth Management piece discusses three strategies that can help advisors expand their client base among millennials.

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How Advisors Can Leverage Google Reviews In Marketing

In this Advisor Perspectives piece, Mindtrap Marketing founder Lee Delahoussaye provides examples that can help advisors leverage Google reviews to market their firms.

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