Keeping you on top of the most significant developments

Pulse

what you need to read

by AALU

November 14, 2019

Stack Business and Charitable Deductions for Maximum Savings

This *Wealth Management* piece walks through several strategies for utilizing charitable contributions in conjunction with the Sec. 199A small business tax deduction to maximize value for clients.

Read more >>

How Life Insurance Can Help During and After a Divorce

AXA Equitable head of life distribution Trey Reynolds discusses five ways life insurance can be used in post-divorce estate planning, including providing funds to help cover divorce expenses, protecting post-divorce income, and providing an inheritance for children.

[Read more >>]

Claiming Social Security Early: A Strategy No One Thinks About

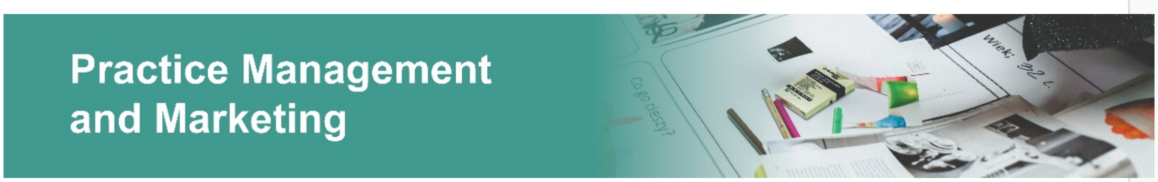
In this *Business Insider* piece, Dan Caplinger discusses how claiming Social Security early and investing the cash could be the best strategy for certain clients.

[Read more >>]

Common Retirement Mistakes and How To Fix Them

This article reviews six common retirement planning mistakes and explains how advisors can help clients correct them.

[Read more >>]



Emotional Intelligence a Must in Navigating Client Relationships

Alumni of Charles Schwab's Executive Leadership Program talked about the need to encourage advisors to raise their emotional intelligence during a panel discussion at Schwab's IMPACT Conference.

Read more >>

Client Prospecting: How To Take Seminars In A Different Direction

Bryce Sanders of Perceptive Business Solutions discusses different types of seminars that advisors can use to prospect for clients.

Read more >>

Best Practices for Plan Sponsors: The Johns Hopkins Case

Drinker Biddle's Fred Reish discusses the takeaways from the recent John Hopkins case settlement and what it means for plan sponsors, including the importance of using appropriate share classes and monitoring of compensation of service providers.

Read more >>

IRS Proposes Update to Life Expectancy and Distribution Period Tables

This *Plan Sponsor* piece describes the recent IRS proposed rule that would update life expectancy and distribution period tables used to calculate RMDs to reflect increasing life expectancies.

Read more >>

Upcoming Events

- **199A Webinar, feat. Carole Foos, OJM Group** | November 18 | 2pm ET | Register Here
- **TRANSFORM 2020** | April 26-28, 2020 | Marriott Marquis | Washington, D.C. | Register Today

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