

In the Community



Retirement Income and Tax Planning Seminar

Thursday, July 11, 2019 6:30–8:30 p.m. Elks Lodge 4249 El Camino Real Palo Alto, CA 94306
Registration is \$25. Retirement planning is more complicated than ever, and it can be hard to even know where to begin. But focusing on a few essential issues can help increase your income in

[Learn more >](#)



New Focus on Wealth Podcast

Tune in Monday, Tuesday and Thursday from 2:00 and 3:00 p.m. on KDOW 1220 as host Chad Burton filters through the "noise" on Wall Street. Have financial questions of your own? Call 1-800-516-1220 to talk to Chad live on the air or tweet your questions to @chadmburton #focusonwealth.

[Learn more >](#)



NewFocus Strategy Review

Watch this video and learn how the NewFocus retirement income strategy can help you create a lasting, reliable source of retirement income.

[Learn more >](#)

LISTEN LIVE

Listen live to Chad and Rob Monday through Friday 6 to 9 A.M. on KDOW 1220 for opinions on critical money issues and a fresh perspective on Wall Street headlines. Have financial questions of your own? Call 1-800-516-1220 to talk to Chad live on the air.

Ask your questions via Twitter:

What's Your Risk Number?

When it comes to investments, everyone should know their risk number. We are all different, and the amount of risk your colleague takes isn't necessarily the risk you should take. Find out the risk level that can give you peace of mind while helping you attain your goals.



NEW FOCUS ON WEALTH

Can dividend income raise your effective rate? The 'ticking tax time bomb' is something retirees should plan around while they are still building wealth.

Can dividend income raise your effective rate? The biggest issue some people face in retirement is the 'ticking tax...'

Early life money mistakes can be harmful to your future. Don't harm your retirement goals by making these top money mistakes.

No matter who is in the White House, businesses will find a way to keep making money. Cashing out...

The SEC's 'best interest' rule is making headlines. Can they do what the DOL was unable

Creating a Clear Path to Financial Stability

NewFocus Financial Group specializes in managing your wealth throughout your life—from building wealth during your career to enjoying that wealth with the lifestyle you want in retirement.

We will collaborate with you to develop a comprehensive and sustainable financial plan that helps maximize your wealth and minimize your risk through sound financial strategy and prudent investment management.

[Learn More](#)

Helping You Preserve and Grow Your Wealth

We can help you build, maintain, and preserve your wealth by providing seasoned analysis, professional advice, and comprehensive asset management. We do this through services that encompass:

[Subscribe on iTunes](#)

Who We Work With

We help a range of clients, including young professionals, pre-retirees, retirees, and business owners. Regardless of their life status, our clients have one thing in common: a desire to work with professionals to secure their financial future.

[Learn More](#)

Recent Blog Posts



7 Tips to Manage Volatile Markets as You Transition to Retirement

April 10, 2019

By Mark Farrelly, CFP®, CDFP®

Market volatility can be sparked by triggers ranging from policy uncertainty in Washington, to earnings reports, to geopolitical unrest. Dramatic moves in the stock market may cause you to question your strategy and worry about your money. A natural reaction to that fear might be to reduce or eliminate exposure



Understanding the Tax Treatment of Your ESPP

March 11, 2019

By Mark Farrelly, CFP®, CDFP®

An employee stock purchase plan (ESPP) provides you with a convenient way to purchase company stock, often via payroll deduction. Like the way you contribute to a 401(k), you can easily allocate money to the ESPP via your paycheck. In addition, your ESPP may offer a purchase discount of up to 15%, allowing



9 Action Steps to Start the New Year on Firm Financial Footing

February 21, 2019

1. Assess Where You Are •

- Update your balance sheet so you know your starting point.
- Confirm cash reserves. If you're still working, strive to maintain at least a six-month cash buffer for any emergencies or unforeseen circumstances such as medical costs or job loss. If you're in retirement, strive to maintain three years

[Subscribe on iTunes](#)