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July 5, 2019

Tax Free Wealth? Many Benefits of a Roth IRA

The many concerns keeping people up at night include what will taxes be in the future? What will my income

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July 3, 2019

What keeps you up at night? Am

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I saving often enough?

I have spoken about many things that may keep people up at night regarding their finances: making sure there is

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Household Minus One- Why Life Insurance? Which kind? How much?

Creating a financial plan and sticking to it helps pave the road for the family's future. It is analyzed and

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An Estate Planning Checklist

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- What keeps you up at night? Am I saving often enough?
- Household Minus One- Why Life Insurance? Which kind? How much?
- An Estate Planning Checklist
- Protecting Your Biggest Asset
- Does the Financial Advisor on your company's 401k retirement plan provide these 5 important services?
- 3 Retirement Plans Every Small Business Owner Needs To Know About
- Woman in Transition:

Create a will if you do not yet have one. A valid will may save your heirs from some expensive

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June 12, 2019

Protecting Your Biggest Asset

Insurance is a common hot button for people. We know we should have it, we're just not sure why? The

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Does the Financial Advisor on your company's 401k retirement plan provide these 5 important services?

Providing a Retirement Plan for the employees of your business can be confusing. The responsibilities of running a business is

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Facing Change in Divorce

- Will I have enough money? Plan what you need
- 2019 RFN Scholarship Winner
- Where Did It All Go?
- Where Did All That Money Go?
- If you have a teenage kid who works, DO NOT give them cash for their birthday or during holidays. Do this instead.
- 10 Investing Mistakes to Avoid
- Should You Convert to a Roth IRA

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Today!**

OHIO (HQ)

June 10, 2019

3 Retirement Plans Every Small Business Owner Needs To Know About

As a small business owner, there is a long list of financial decisions that you need to make on a

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June 7, 2019

Woman in Transition: Facing Change in Divorce

Through my years assisting individuals with their finances, I have repeatedly faced the need to help women going through financial

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June 6, 2019

Will I have enough money? Plan what you need

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What keeps you up at night series. Finances keep many people up at night. As an advisor, the most common

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May 29, 2019

2019 RFN Scholarship Winner

“What does financial responsibility mean to you?” by Treasure Rouse
It is in my opinion that financial responsibility is extremely

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