

#1 Best Way To Help The Kids or Grandkids? Get That Roth IRA Going

by [Mari Adam](#) on [JULY 7, 2019](#) in [ON YOUR OWN: MONEY SMARTS FOR MILLENNIALS, REAL CLIENT ADVICE, RETIREMENT](#)

During a client meeting in our office last week, we talked about how they – parents of young adult kids (in their 20s and young 30s) – could help the kids get onto a sturdier financial footing without killing their own initiative or enabling them. We've written about this a lot, but it's always worth repeating [...]

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Not Taking Your Vacation Time? Better Rethink That

by [Mari Adam](#) on [JULY 7, 2019](#) in [HEALTH & WELLNESS](#)

Have you ever told yourself you're too busy to take time off from work, or neglected to take the leave you've earned?

You're not the only one. American workers accumulated 705 million vacation days in 2017 (the last year surveyed), and failed to use them. If that sounds like you, here's some good reasons to re-think [...]

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Why Retirees Are Losing Trillions Of Dollars With Bad Social Security Advice ... But Not Our Clients

by [Mari Adam](#) on [JULY 2, 2019](#) in [COMPANY & COMMUNITY NEWS, RETIREMENT](#)

We're sorry to hear that American retirees are losing \$3.4 trillion in potential retirement income by making bad decisions about when to start their Social Security benefits. Not our clients. As part of our retirement services, we help clients explore different options and optimize claiming strategies so they get the most bang for their buck. In [...]

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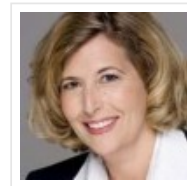
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ABOUT MARI ADAM, CFP®

Mari Adam, **Certified Financial Planner™** and President of Adam Financial Associates Inc, has been helping individuals and families chart their financial futures for twenty five years.

Mari has appeared in publications such as Business Week, CBS MarketWatch, Wall Street Journal, Kiplinger's, Newsweek, and Money Magazine.



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Changes To Your IRA On The Way? Not All Of Them Are Good

by [Mari Adam](#) on [JULY 2, 2019](#) in [RETIREMENT](#)

If it's up to the Congress, there may be some major changes to your IRA before the end of the year. And not all the changes are good. The House has passed the SECURE (Setting Every Community Up for Retirement Enhancement) Act. It's now up to the Senate to consider the bill, which has been [...]

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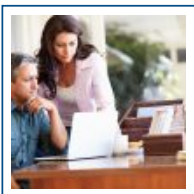


Top Retirement Hot Spots

by [Mari Adam](#) on [JULY 2, 2019](#) in [RETIREMENT](#)

More people are moving to New Mexico in retirement than anywhere else. In fact, 43% of all people relocating in retirement are headed toward the Land of Enchantment, found a recent survey. Florida comes in as the 2nd top destination, capturing 39% of all retirees looking to relocate. What are these retirees looking for? They're [...]

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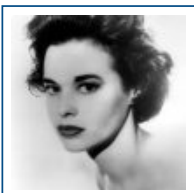


Quote Of The Week: Shopping For A Financial Advisor

by [Mari Adam](#) on [JULY 1, 2019](#) in [COMPANY & COMMUNITY NEWS](#), [FINANCIAL PLANNING](#), [QUOTE OF THE WEEK](#)

“If you want professional help, shop for a financial adviser who is a certified financial planner or is a certified public accountant with a personal finance specialist designation. Use an adviser who discloses fees and has fiduciary responsibility to put your interests first.” Linda Stern, How to Break Bad Investment Habits, AARP Magazine, June 21, [...]

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Gloria Vanderbilt Didn't Leave Her Fortune To Her Kids. Should You?

by [Mari Adam](#) on [JUNE 25, 2019](#) in [ESTATE PLANNING](#), [PEOPLE & PROFILES](#)

Gloria Vanderbilt, socialite, heiress and successful fashion designer, died last week at age 95. Years ago, she reportedly decided not to pass on her substantial fortune to her children,

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including CNN anchor Anderson Cooper. In a 2014 interview with Howard Stern, Cooper explained why he was OK with her decision. “My mom’s made clear to me [...]



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Smart Beneficiary Choices Can Save Your Heirs Thousands

by [Mari Adam](#) on [JUNE 25, 2019](#) in [ESTATE PLANNING](#), [REAL CLIENT ADVICE](#)

I just wanted to share a quick story showing how picking the right beneficiaries for your retirement and other accounts can save your family and heirs thousands of dollars. We recently met with one of our clients, Brenda*, who has two grown children she wants to inherit her assets. Brenda also wants a portion of [...]

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Florida Attracting Tax Refugees From Up North

by [Mari Adam](#) on [JUNE 25, 2019](#) in [REAL ESTATE AND MORTGAGES](#), [RETIREMENT](#), [TAX](#)

More northerners in high-tax states are cashing in their real-estate chips to move to places like Florida, reports the South Florida SunSentinel. Real estate pros say “a steady flow of tax refugees” is heading to the Sunshine State from places like New York, New Jersey and Connecticut. Some real estate experts in the know claim that [...]

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Got A 401(k)? See If It Offers These Special Perks

by [Mari Adam](#) on [JUNE 25, 2019](#) in [COMPANY & COMMUNITY NEWS](#), [INVESTING](#), [RETIREMENT](#)

Got a 401(k)? About one-third of all Americans do. But you may not be aware that not all 401(k)s are created equal. People are often surprised to learn that many plans do not offer all the perks and benefits permitted under IRS rules. That’s because employers are allowed to pick and choose the features they [...]

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