Greetings:

I hope everyone is enjoying their summer. Video's tell a great story, be sure to watch the video on Dimensional, our institutional partner as well the video on Tips to Help Improve Retirement Confidence. Monte Carlo analysis is something we "sometimes" use to run retirement analysis, we added an article on this topic as well.

As always, please call us if you have any questions. Talk to you real soon!

Mario

The 2014 Social Security Trustees Report: What Does the Future Hold?

Every year, the Trustees of the Social Security Trust Funds release a report to Congress on the current financial condition and projected financial outlook of the program. This year's report, released on July 28, contains valuable information about the health of Social Security that may help you understand how your Social Security benefits might be affected.

Tips to Help Improve Retirement Confidence

Watch this short video for tips on how to improve your confidence in retirement.

Estate Tax Changes Under the 2010 and 2012 Tax Acts

This article summarizes the changes made to the federal gift and estate tax and the federal generation-skipping transfer (GST) tax under the Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010 (the 2010 Tax Act) and the American Taxpayer Relief Act of 2012 (the 2012 Tax Act). A chart at the end of the discussion summarizes the effects of this law.

Dimensional Video

For more than 30 years, Dimensional has been translating compelling research into practical investment solutions for our clients.

Monte Carlo Analysis

When you sit down with a financial professional to update your retirement plan, you're likely to encounter a Monte Carlo simulation, a financial forecasting method that has become popular in the last few years. Monte Carlo financial simulations project and illustrate the probability that you'll reach your financial goals, and can help you make better-informed investment decisions.

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