

Monthly Newsletter



Whatever cause you value most deeply, changes to the tax code in 2020 may limit the tax deductions you can take or charitable donations. However, another way to lower your tax bill is qualified charitable distributions (QCDs).

A **QCD** is a nontaxable distribution from your IRA that is paid directly to a qualified charity of your choice. You do not receive a tax deduction for the gift, BUT the transfer from your IRA is NOT counted as taxable income. Take a look at our article.

[QCD Article Here](#)



As we approach Thanksgiving, we wanted to share a lighthearted activity to add fun to your holiday gathering! This simple game is a great way to share laughs, spark conversations, and make memories with your loved ones.

[Thanksgiving Fun Table Questions](#)



As the year ends, it's a good time to review goals and address financial tasks for the year ahead.

Our hope is that this checklist I created helps you consider some aspects of your financial life you may not have thought about or may need to consider.

[Your Year End - Financial Checklist](#)



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