

Hi {Firstname},

Monthly Newsletter



Social Security (OASI) Trust Fund is projected to become depleted in 2033 according to Social Security Administration – June 20, 2025

[Read my Article](#)

The Social Security Security Clock is Ticking

The 2024 Social Security Trustees Report projects the OASI Trust Fund will be depleted by 2033, potentially triggering a 23% cut in benefits unless Congress acts. Aging demographics, longer life expectancies, and a shrinking worker-to-retiree ratio are pushing the system to a tipping point.

If you're nearing retirement, now is the time to plan. Don't wait for Congress—take proactive steps to secure your financial future.

Read the full article to understand the implications and what you can do now to prepare. Your retirement deserves more than hope, it deserves a plan.



Estate Management 101

A will may be only one of the documents you need—and one factor to consider—when it comes to managing your estate.

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A Checklist for When a Spouse or Parent Passes

An overview of some fundamental steps when a loved one passes.

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9 Facts About Social Security

There are things about Social Security that might surprise you.

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Navigating Retirement Pitfalls

Why are they made again and again? Making sense of these errors in judgment.

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