



Your Retirement. *Proactively* Planned.



August 2024

The Phillies are playing well, the Eagles are practicing, the Ocean Breeze on vacation was nice, and we had some changes to the way taxes work for the folks we work best with - retirees. A lot going on!

This month's newsletter comes to you in a [new format](#), from a [new email](#) provider. Freshening things up!

One of the key elements in this email is a link to a well written article I found about the **mistakes** that can **cost** folks when they don't understand taxes in retirement. (*The Rule of \$1 Dollar More*). It highlights **the reason WHY** we do **Proactive Tax Planning** with clients and why **the FALL is a key time** to meet.

But Fall isn't here yet. Enjoy the lazy, hazy days of August!

Cheers!
-Bryan



Retirement & Tax Topics



I found a TERRIFIC listen on the Audible platform...

A 'course' full of 36 captivating half-hour lectures on a variety of topics from Ancient Rome to Modern Day. It's called "A History of Freedom". Worth a look...

[Check it out](#)



Why Proactive Planning Meetings *(a key part of our client process)* **are so important.**

Kiplinger Magazine talks about ["The Rule of \\$1 More"](#) and how much it can **COST YOU** if you don't understand how taxes work in retirement. Check it out:

[Click Here to Read It...](#)

TAX TIME



FALL is tax strategy season!

It's the *perfect* time to make moves that help you *keep more—and send less—to Uncle Sam.*

With new changes from the OBBBA Act impacting retirees, I'll be emailing links to insightful local classes and valuable webinars as I get them scheduled.

Looking for even more Tax & Retirement Insight... *or want to see what you may have missed?*

Check out some of our other resources here:

Facebook: <https://www.facebook.com/BrytheRetirementGuy/>

YouTube: <https://www.youtube.com/@brytheretirementguy>

Downloads: <https://www.revisionistwealth.com/#Downloads-RW>

Courses: <https://getretirementright.teachable.com/>



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