



Greetings:

As we wind down the year I wanted to share some articles on issues most of us are still talking about. As you would expect, healthcare still dominates the news seeing that it does affect many of us financially. I also included all the pertinent tax rates and tables for 2014.

With all of the money printing going on inflation could rise dramatically and precipitously. See how this will affect bond prices and yields in this short video titled "Rising Interest Rates and Your Portfolio".

Finally, our institutional partner Dimensional Fund Advisors (DFA), just released a great video on the "Power of the Markets".

Talk to you real soon!

Mario

[Grandfathered Plans: Can You Keep Your Current Insurance Plan?](#)

Over the past several months, many people have received cancellation notices from their health insurance carriers, often accompanied by the explanation that their current insurance plan doesn't meet the minimum requirements of the Affordable Care Act (ACA) scheduled to take effect January 1, 2014. In many instances, insurers are offering to replace the cancelled insurance plan with more expensive coverage that presumably offers more benefits.

2014 Key Numbers

This article contains key numbers for your 2014 Individual Income Tax Planning, Including: Business Planning, Education Planning, Protection Planning, Estate Planning, Government Benefits, Retirement Planning, & Investment Planning.

Rising Interest Rates and Your Portfolio

Since 1981 we have experienced low interest rates. With the recent trends of rising interest rates, do you know what you should expect and the factors to consider regarding your portfolio?

The Power of Markets

Together we know more than we do alone. Trying to anticipate the movement of the financial market can add anxiety and unnecessary risk. Are you working with a firm that is putting the power of the market to work for you?

Social Security Retirement Benefits Basics

Social Security benefits are a major source of retirement income for most people. Your Social Security retirement benefit is based on the number of years you've been working and the amount you've earned. When you begin taking Social Security benefits also greatly affects the size of your benefit.

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