MoneyMATTERS

May 2023

This month, our newsletter explores the following topics:

- Money rules I follow to build wealth
- What the banking crisis means for mortgage rates
- What really happens during an IRS tax audit
- How health should factor into your financial planning

As you navigate the ever-changing financial landscape, please don't hesitate to reach out if you would like to discuss your finances.

Sincerely,
Jeff Howard, ChFC®, RICP®, CExP

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‘I Will Teach You To Be Rich’ Author: 3 Money Rules I Follow To Build Wealth And Enjoy Life—And How To Create Your Own

Building wealth often means making sacrifices and tough decisions on how to invest your money and time. Putting easy-to-follow guidelines in place for yourself can make those choices go quicker and help you stick to your wealth-building goals. Sethi’s own money rules can give you some inspiration if you’re not sure where to start.

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What The Banking Crisis Means For Mortgage Rates

Home buyers can anticipate mortgage rates to move down through the rest of this year as the banking crisis drags on, which could cool down inflation. But there are bound to be some bumps along the way. Here’s why rates have been bouncing around and where they could end up.

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What Really Happens During An IRS Tax Audit

An audit is less dramatic than it appears in the movies – here’s what to expect and how to help it go smoothly.

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How To Factor Your Health Into Your Financial Planning, According To A Doctor-Turned-Advisor

When you consider health as part of a financial plan, you may think in terms of insurance premiums and related out-of-pocket costs like copays. While those expenses matter, your health should influence far more than a single line item in a budget. Here’s what else you might consider.

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