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February 2024

Hello Joe,

This month, our newsletter explores the following topics:

- Five 2024 policy shifts that can affect retirement savings
- Five best financial moves to make in 2024
- Expectations for buying a house in 2024
- What to know about 2024 tax filing season

Financial decisions are being influenced by more factors than ever, many of them seemingly contradictory. Please don't hesitate to contact us if we can help you assess the best strategies for your financial future.

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

Interested in a career with Consolidated Planning? Click here.

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5 Policy Shifts That Can Change The Way You Save For Retirement In 2024

A piece of legislation known as Secure 2.0 passed Congress in 2022 and brought with it a raft of changes to the rules surrounding Americans' retirement savings. Dozens of changes are on the calendar from now through the end of 2027. Here are five key shifts that will take effect in 2024 and what they mean for you.

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2024 To-Do List: Five Best Financial Moves To Make

Do these five things to shore up your financial plan and be better prepared and organized for 2024.

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Buying A House In 2024: What To Expect

The market remains tough for buyers, but there's still no time like the present to start shopping. The long-term benefit of buying often outweighs the pain of toughing out the search.

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Tax Filing Season Kicks Off Jan. 29. Here's What Taxpayers Need To Know

The IRS will start accepting and processing 2023 tax returns for individual filers on January 29. Most taxpayers must file federal returns and pay balances by April 15 to avoid penalties and interest.

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