

## **ACTION Tidbits**

This month we deviate from our ***How to Retain & Attract Talent*** series because we wanted to share some year-end tax planning strategies and considerations. Hard to believe 2019 is only weeks away, but don't worry, you still have time to act on maximizing your tax benefit potential!

### **Year End Tax Planning Strategies You Should Consider**

Taking steps at year-end to maximize tax benefit potential is a good practice for most people. We take a look at two considerations: 1) ROTH conversion and 2) Charitable Contributions. Don't worry, there's still time to act....[read full article](#)

### **New York Life Chairman's Council Annual Meeting**

At the end of October Brian and part of the AFS team headed to Arizona for the New York Life Chairman's Council Annual Meeting. Here, Brian was recognized for his Lifetime Membership to Chairman's Cabinet, meaning he has consistently ranked among the top 50 agents (of 12,000) for over 20 years. He is shown with Jenny, Wendy and Krista at the awards dinner recognizing the top Agents at this special event.

Brian also had the honor of presenting on "Leveraging the New Tax Law" to his colleagues during the business sessions of the annual meeting.



## **Attitude of Gratitude**

The recent Chairman's Cabinet event introduced us to author and positive psychology researcher, Shawn Achor, who presented "The Happiness Advantage: Linking Positive Brains to Performance." Shawn gave a positive and inspirational talk surrounding happiness. A takeaway our team brought back was to develop a habit of daily gratitude. To put that into practice, we asked our team to share one thing they are thankful for. Of course, everyone's thoughts immediately went to their children, spouse, family, health, career, etc...but we challenged them to get a little more creative:

**Jenny:** The opportunity to travel across the country and see some of the amazing places our country has to offer.

**Joy:** The Wisconsin Badger Basketball team & NCAA March madness to fill the time before Brewers season starts again.

**Krista:** Deer Hunter's Widows weekend

**Wendy:** When the office radio station is turned to Y100

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From your friends at Action Financial Strategies,  
Brian, Brad, Greg, Jenny, Joy, Krista and Wendy

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