Tidbits Issue 4 - April 2018

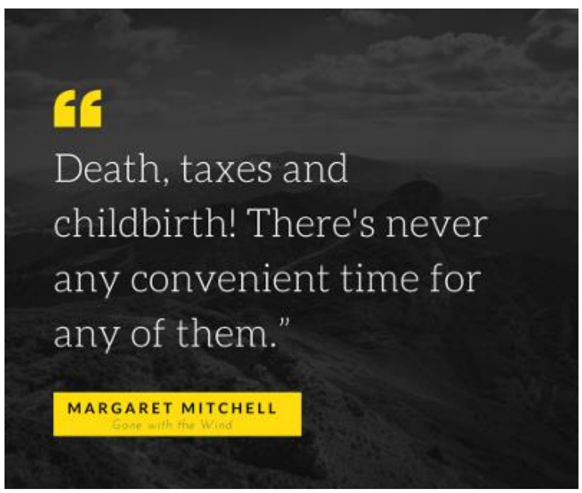
ACTION Tidbits

In this month's issue we tackle some tax related considerations for idle cash in our first article. In our planning, we always look to make sure we are addressing a tax-balanced perspective when it pertains to funding future goals. With it being April, and many Americans filing taxes by the April deadline, we felt this article would be a timely consideration both now and for the future tax year.

In our second post, we share some activities we've been busy with in the last few months. Included are a few takeaways from recent educational opportunities Brian was able to take advantage of. We are continually committed to making sure that we're staying informed and pushing toward the best ideas and strategies for the benefit of our clients.

How to Make Your Cash Tax Free

Have you ever wondered what to do with extra, or lazy money you have in savings? Perhaps some would like to save it for retirement or a future goal, but are unsure on what to do. Have you considered putting some money over to the "tax-free" side of your future investments with a ROTH IRA? Read on for a list of features and benefits...



Seminar Recap

Brian was fortunate to attend the Top Producers meeting for Eagle Strategies LLC (our registered investment advisor resource) in Dallas, Texas. Here, Brian received cutting edge information on how to track data, how to create great client experiences, and the latest information in regard to our economy, the future, and what can be expected as it pertains to money management. This created a very timely parallel to our current mission of creating a great client experience at Action Financial Strategies.

Our team has been working to evaluate our processes and implement plans to 1) ensure timely and effective communication with clients, 2) create a seamless onboarding process, 3) execute client meetings that are valuable, timely and pertinent to each client's unique situation, and 4) to ultimately provide you with the time, attention and individual focus to help you live the good life...now and in the years to come.

Brian and Brad look forward to sharing all of these updates with you the next time we see you.

Get to know Brad!

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

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