ACTION FINANCIAL STRATEGIES

Tidbits Issue 9 - October 2018

ACTION Tidbits

This month's newsletter is packed with some exciting updates and announcements we're excited to share with you! We also continue with our series on ***How to Retain & Attract Talent*** by looking at the "162" Bonus Plan. This particular executive bonus arrangement may be of interest to employers who are looking to reward and retain key executives with supplemental benefits. It also may be of interest to employers who have qualified plans in place, but feel they need another benefit with which they can reward certain key executives.

How To Retain and Attract Talent Strategy 2:
The "162" Bonus

An executive bonus arrangement, also sometimes referred to as a "Section 162 Bonus Plan," is a benefit arrangement in which an employer pays bonus compensation to selected executives in the form of premium payments on the executives' personally owned life insurance policies. It is most easily described as employer-funded personal life insurance. Is it something you should consider for your employee(s)?...read full article

2018 Advisor Symposium

On Tuesday, November 6, from 12:00-4:00 CST, New York Life will present the 2018 Advisor Symposium, a continuing education and professional networking event designed for financial service professionals.

Action Financial Strategies will be hosting this event at two locations and would like to extend an invitation to attorneys, accountants, and other financial professionals to join us:

NEW HOLSTEIN
Action Financial Strategies
1411 Milwaukee Drive
New Holstein, WI 53061

GREEN BAY
St. Brendan's Inn
234 S Washington Street
Green Bay, WI 54301

This year, our prestigious lineup includes attorney Martin Shenkman, who will discuss trust planning in the new planning environment; CPA Robert Keebler, who will present an overview of the new Section 199A as it relates to estate and business planning as well as how to use non-grantor trusts under the new Tax Act; attorney Patricia Annino, who will provide an overview of the challenges of ethical practices in today's challenging world; and New York Life Corporate Vice President, Greg Holmgren, who will share issues and considerations related to buy-sell planning and discuss the ways life insurance benefits can be used.

You also may receive continuing education credit — CE approvals for insurance professionals, enrolled agents, accountants and attorneys will be announced in advance of the event. Note the Ethics CLE for Attorneys.

Contact Wendy at wendys@actionfinancials.com to register. You may also register via Eventbrite:
Click for the NEW HOLSTEIN Session

Click for the GREEN BAY Session.

For more info, please visit http://nyladvisors.com/2018as/

AFS Website Launch

We are beyond excited to announce the upcoming launch of our newly refreshed website - we can't wait for you to see it in a few weeks. Some features to look forward to include:

- Meet-Our-Team section
- New self-service options for our clients
- Better understand our planning process
- Stay informed with educational events, articles and videos
- Request an appointment online
- Easy access your personal eMoney website

New Green Bay Location

For those of you that visit our Green Bay office, please note that as of October 5, we have moved to a new suite location within our Green Bay location. While our office remains at 926 Willard Drive, our team is now located on the second floor, in Suite 246.

Action Financial Strategies, LLC
926 Willard Drive
Suite 246
Green Bay, WI 54304

AFS Welcomes Joy and Greg

Joy Bridson
We're very excited to welcome Joy Bridson to the team! Joy joined us in Septemb
Service Assistant. Her past experience with a financial service firm, along with he
friendly and outgoing personality, make her a fantastic addition to the team. Joy's
will be filled with responsibilities such as appointment preparation work, illustratic
customer service and confirmation calls.

Joy's family lives in Kiel, where her three children keep them busy with soccer, basketball and baseball.
Joy:
1) Her all-time favorite food is chocolate.
2) 12 is the number of times she's seen the acapella group Home Free perform.
3) The thing she can't live without is laughter.

Greg Thomas
We are equally pleased to welcome Greg Thomas of Green Bay to our team. Greg brings almost two decades of financial experience to his new pursuits with us. He will be growing with clients in the Green Bay area as well as be looking to further his business development pursuits in helping new financial professionals to become affiliated with New York Life and growing the Action Financial Strategies and New York Life presence in Northeast Wisconsin.

Greg and wife Julia live in Howard, with their three children Andrew, Kathryn and Noah. Fun facts about Greg:
1) Has started his private pilot flight lessons.
2) 11 is the number of times Greg has been to Canada on "fly-in" fishing trips.
3) Greg's favorite morning beverage is Pomegranate Green Tea.

<u>Pacific Coast Travels</u>

One item on Brian's bucket list has been to see the big trees in Portland, OR. He and his wife Gina spent a few days on the beautiful Pacific Coast a few weeks ago, where he got to check this off the list! "Definitely worth it," says Brian!

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

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