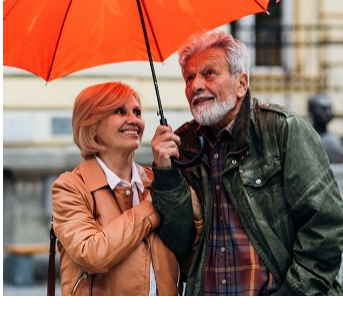


August Newsletter

Donohoe/Litka/Wenzel Group

In the August edition of our newsletter we share valuable insights and resources to further your financial literacy. We believe knowledge is the base of your financial freedom. Please feel free to share it with anyone who may benefit, and reach out if you'd like to discuss any topics in more detail.

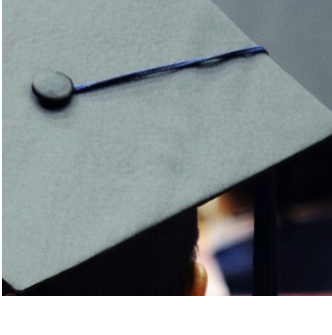
Investor Resources



What is a 'Trusted Contact' and Why Should You Have One?

Establishing a trusted contact is a crucial step in safeguarding your accounts from potential fraud, ensuring there is always a reliable point of contact in unexpected situations.

[Learn More](#)



5 Things You May Not Know About 529s (But Should)

They're tax friendly, flexible, and available to anyone. Yet, 529 education investment plans are still underused. Here are five things anyone hoping to get a leg up on education costs need to know.

[Learn More](#)



Larry Fitzgerald Jr. Talks Philanthropy and Investing After the NFL

The renowned NFL wide receiver shares insights on aligning your investments with your values.

[Learn More](#)

Team Spotlight



Brian Donohoe, CIMA®

Senior Vice President, Wealth Management
Financial Advisor
Corporate Retirement Director

[Contact](#)

Brian has been in the Financial Services industry for 26 years. He believes success in achieving important financial goals starts with a comprehensive wealth strategy. This could include individual stocks and bonds, model portfolios, and third-party investment strategies.

The recent shift in the market during the first quarter of the year reminds us that resilience and discipline can be key. Tailoring a proactive approach, not reactive, is a part of Brian's philosophy.

Whether you are accumulating wealth, investing for income, solidifying your retirement plan or devising a distribution approach he can help you meet your lifestyle and legacy goals.

Outside of the office, Brian enjoys golf and spending time with his wife and four children.

Finance & Wellbeing



Making the Most of Your Retirement Savings

Carefully managing distributions from your portfolio during retirement may help you save on taxes, leaving you more money to spend and enjoy.

[Learn More](#)



Tax-Loss Harvesting

What is tax-loss harvesting exactly, and how do some investors use it to opportunistically reduce their tax bills?

[Learn More](#)



Navigating the Emotional Transition of Selling a Business

Preparing for life after the sale of your business involves reflecting on your success and setting goals for the future.

[Learn More](#)

The Team



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Tax-loss harvesting. IRS rules stipulate that if a security is sold by an investor at a tax loss, the tax loss will not be currently usable if the investor has acquired (or has entered into a contract or option on) the same or substantially identical securities 30 days before or after the sale that generated the loss. This so-called "wash sale" rule is applied with respect to all of the investor's transactions across all accounts.

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