POTOMAC FINANCIAL
PRIVATE CLIENT GROUP, LLC

Your Financial Journey

Helping You Make Better Financial Decisions

Volume 9

Dear Friends,

Welcome to 2018! For many of us, the beginning of a new year can bring forth many thoughts and emotions as we not only look back through last year's memories but also look forward to the challenges and adventures certain to come in the year ahead. With our first newsletter of 2018, we have featured the article, 6 Lessons of The Ultimate Gift. As some may recall, The Ultimate Gift is both a book and a movie and provides insights into being generous, sharing success and showing gratitude. We hope this article helps you reflect on the holiday season and year that has just passed and the countless ways in which you have humbly impacted those in your lives and shared your gifts of friendship, compassion and kindness.

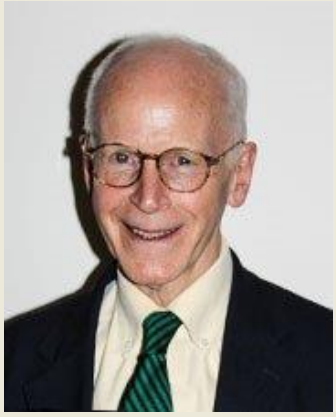
On behalf of all of us at Potomac Financial Private Client, Group, LLC, (Mike, Joe, Tim, Tacy, Clem, Amy, Ryan, Kyle and Sebastian), we thank you for the great privilege of being of service to you in 2017 and the opportunity to be a part of your family and your lives. We wish you much success and happiness in the New Year!

Steve

6 Wealth & Success Lessons From The Ultimate Gift

Tax Cuts and Job Act of 2017: What Taxpayers Need to Know

On December 20, 2017, the U.S. House of Representatives and U.S. Senate passed the Tax Cuts and Jobs Act of 2017 (the act or TCJA). The legislation makes significant changes to the Internal Revenue Code (IRC), including individual, corporate, and gift and estate taxation. This piece highlights important changes affecting you and suggests potential strategies to employ prior to year-end. ***Read more...***



OPINION:

10 Reasons To Consider Corporate Governance

by Clem Dinsmore, JD, Financial Advisor

Many Investors are giving consideration to Corporate Governance when making investment decisions.
Learn why *here.*

Tacy Paul Roby Joins UMUC Faculty

Tacy Paul Roby, CFP®, will join the Finance and Economics Department of the University of Maryland University College (UMUC) as adjunct faculty for the 2018 Spring semester. She will teach a class on investments. “We are delighted for Tacy Paul Roby to join our team. Her 20+ years of investment industry experience including twelve years at the global firm of Calvert Investments will be a great asset to our students.” said Kathleen Sindell, Ph.D., Program Chair, Personal Financial Planning, University of Maryland, University College.
Read Tacy's full bio ***here***

Quarterly Market Review now available for 4th Quarter 2017 *Read it here...*

Lunch & Learn Webinars

Join us this month for
A Guide to the Markets - 1st Quarter
Thursday, January 18 at 12:00 PM EST

Click here to join

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