POTOMAC FINANCIAL
PRIVATE CLIENT GROUP, LLC

Your Financial Journey

Helping You Make Better Financial Decisions

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Your Guide to Year-End Financial Planning for 2022

Presented by Potomac Financial Private Client Group

As 2022 comes to a close, you'll want to reassess your financial goals, examine any life changes that will affect your saving or spending, and learn about recent developments in the world of taxes and finance that might benefit you. So, before you head to your annual meeting with your financial advisor, read over these questions and use them as a helpful guide for your conversation.

9 Reasons You Should Consult With Your CPA Before Year-End

While national focus has been on uncertainty around new tax laws, there are many individual tax-planning opportunities you should consider before year-end to ensure you are getting the best deal while staying compliant.

Although the Tax Cuts and Jobs Act of 2017 and SECURE Act of 2019 captured national attention, there are still plenty of tax-planning opportunities you need to pay attention to, particularly if there has been a change in your financial situation during the year. Good tax planning enables you to stay compliant while positioning yourself to pay as little in taxes as possible: 9 Reasons Why

IRS Benefit Plan Limits for 2023

Presented by Ryan Kellinger, CFP®, Advisor

On October 21 2022, the Internal Revenue Service released Notice 2022-55, announcing cost-of-living adjustments that affect contribution limits for retirement plans and retirement accounts in 2023. The list, though not exhaustive, highlights key changes that retirement plan sponsors should be aware of, as well as several limitations that remain unchanged from 2022. Click here for full details.

Webinar Replay Now Available

Missed our October Webinar? Listen to the replay of JP Morgan's 3rd Q Guide to the Markets.

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