Mesirow

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Managing your personal wealth isn't just about the dollars and cents. It's about connecting with what matters to you. Across all generations from life changes through life stages, Mesirow is here to help. That's why every quarter we write content on topics that we hope are relevant and insightful for you.

A beginner's guide to 529 plans

It's important to understand the specifics of funding, paying, the timing and handling of distributions, and managing leftover funds in these accounts to maximize the tax advantages offered by 529s.

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Why you need a financial plan

Written plans are critically important to helping you along the way. When it comes to your personal finances, the same is true. A written financial plan can be used to identify your short- and long-term wealth objectives and to create and implement strategies to help you achieve them. Your financial goals become attainable and measurable.

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Second time's the charm: Achieving financial independence after 50

Mesirow has helped a number of client's with unique financial situations. In this case study the client hit financial success at 50 years old, earning approximately $1.4 million per year. Prior to this later success, she had no significant savings.

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The impact of changing interest rates on estate planning strategies

Changes in the Federal Funds Rate cascade to all corners of finance, from credit card rates, auto financing, mortgages and other rate-sensitive loans, to the fixed income (bond) markets. These changes can also impact many estate planning strategies.

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Tools you can use

Mesirow Mondays – Listen In

On the first Monday of every month, Mesirow thought leaders are featured on the WGN Radio 720 "Your Money Matters" show hosted by Jon Hansen. Listen to recent broadcasts about retirement and tax-advantaged strategies.

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Small Business Guide

If you are a business owner who is planning on selling your business now or in the future, our goal is to make your journey as efficient as possible. This brochure is designed to help you understand what's involved and to ask the right questions.

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