

# Connections | September 2023

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.

## **FDIC Insurance: What you need to know after the recent bank failures**

The Federal Deposit Insurance Corporation (FDIC) was founded in 1933 during the Great Depression to increase public faith in US Banks. Learn about how the FDIC effects your bank savings.

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## **Case Study: Peace of mind for generations: How Mesirow helped a family protect their assets and legacy**

A family came to Mesirow because the trusts' investments, utilization of the funds for the client's ongoing needs, and eventual transfer to the next generation was in question. In the end, Mesirow helped the client and his family pursue peace of mind.

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## **Are your philanthropic gifting strategies still up to date?**

There have been changes to IRS regulations over the last few years that have, in some instances, expanded how an individual may want to consider carrying out charitable giving. If you are making charitable contributions, now is a good time to re-examine the tax benefits of doing so, and if the gifting strategies you are utilizing are best for you.

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## **Renting versus buying a home: Deciding what's best for you**

When finding a place to call home, the decision to rent or buy can impact your lifestyle and financial situation. Both renting and buying offer distinct advantages and considerations, and it is important that you carefully evaluate them before making a decision.

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## **Tools you can use**

Mesirow Mondays – Listen In

**On the first Monday of every month, Mesirow Wealth Management 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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**Bringing retirement into focus: Four steps toward retiring early and well**

**If you are considering whether retirement is right for you, this guide will help you think through some important decisions**

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