Blog Post Topic Menu

Below are the blog posts we have found to perform exceptionally well for our advisor clients. Need help writing, editing, proofreading, and deploying your blog posts? That's what our Total Marketing Package is for! Learn more or sign up now to get started and save $100 on your setup charge today.

Top-Performing Foundational Posts

Why I Became a Financial Advisor
What We Do And How We Can Help
How Does Your Retirement Savings Compare To Your Neighbors'?
See a Sample Financial Plan
Get Started Now: Schedule an Appointment Online

Client Profiles

Client Profile: How We Helped A Couple Transition To Retirement
Client Profile: How We Helped A Couple Organize Their Finances And Plan To Retire With Confidence
Case Study: How A Self-Employed Professional Saved Big on Taxes

Showcase Your Personality

A Personal Note During the Coronavirus Pandemic
My Thoughts on The Recent Market Decline
What I've Learned in my 10 Years Working for a Family Office
If I Could Only Teach One Financial Lesson
Happy Thanksgiving: Here's What We're Grateful For
We Are Here For Your Friends And Family This Holiday Season
The Biggest Financial Mistakes I See
What I Wish I Had Known About Money When I Was Younger

Promote Your Events

Business for Breakfast Event Announcement
Please Join Us for Our Exclusive Webinar
Our Market Update Webinar (Watch The Replay Now)

Get More Referrals

Worried About Your Financial Plan? Schedule A Q & A Call Today
Do Your Friends And Family Need Financial Guidance? We're Here To Help
Do You Know Someone Who Needs Our Financial Guidance?
Do Your Family And Friends Need Our Help? I Now Offer Virtual Meetings!
Does Your Portfolio Need A Second Opinion In This Time Of Crisis?
We're Never Too Busy To Help Someone You Care About

Firm Updates

Meet Our Team Member: Brian Freeland
Introducing Ryan, Our New Intern
Announcing Our Website, Videos, and Newsletter!
Did You Know We Have An Office In Rochester, MN?
We've Made The "Best Of Winter Park" List
What We Can Learn From Millennials: Scott Was Featured On 10 News
We Can Arrange Private Air Travel

Advisors Going Independent

Announcing Big Changes to Our Practice
Why We Chose to Go Independent
How Does an Independent Financial Advisor Benefit You?
Industry Trends Show Top Advisors Leaving Wirehouses
Is Your Financial Advisor a Fiduciary?

Launching New Brand and Website

Announcing Our New Website & Newsletter
Announcing Our New Firm and Logo
Take a Live Tour of Our New Website
What We Do and How We Can Help

What's New at Our Firm and How Will it Benefit You?

Location-Specific Posts

Buying A House In Southern California? Here's How Much You Can Afford
How Much Does Long-Term Care Really Cost in Connecticut?
Why I Love Living In Morristown, NJ
My Three Favorite Restaurants In Vancouver, WA
Which Connecticut Taxes Will Affect You The Most

Target Your Niche

Business Owners

Are You A Senior Business Owner?
The Business Owner Exit – Succession Process
Everything You Need To Know About The CARES Act
Personal IRA Vs. Employer-Sponsored Retirement Plans
Do You Know How Much Your Business Is Worth?
Are You Maximizing Your Company's Benefits Package?
How To Prepare For The Sale of A Business: My Personal Experience Selling
Attract Investors And Reward Employees With Section 1202 Qualified Small Business Stock
The Pros And Cons Of Deferred Compensation
Ebook: How Women Business Owners Can Save for Retirement and Reduce Taxes
How Business Owners Can Catch Up for Retirement In A Hurry
The BizEquity Small Business Survival Guide for the Coronavirus
How an ESOP Can Help Business Owners Exit Their Firm

Attorneys

Retirement Planning Strategies for Attorneys
Do You Need Support For Your 1031 Exchanges
Top 5 Financial and Retirement Planning Challenges Attorneys Face

Executives

Top 5 Financial Planning Challenges of Corporate Executives
Financial Wellness For Apple Executives – The Basics
The Top 10 Financial Actions Every Google Executive Should Take

Physicians

What Physicians Need To Know About Pension And Social Security
Five Things Physicians Must Know To Plan For Retirement Income Needs
5 Ways Doctors Can Grow Their Practices
What Can Physicians Learn From Adrian Peterson's Financial Failure?
Should Doctors Pay Off Their Debts or Invest the Money Into Their Practice?

Employees

What You Should Do About General Electric's Pension Plan Changes
How to Get the Most From Your Intel Employee Stock Options
Best Practices For Cashing Out Your Chevron Restricted Stock Units
Do You Have Multiple Retirement Plans? How To Consolidate And Maximize Returns
How Much Of Your Honda Company Stock Is Safe To Own?
What To Do When Your Ford Stock Options Vest
Important Considerations For The Bristol-Myers Squibb Pension Plan Closure

First Responders

Report: Retirement Planning For First Responders
5 Unexpected Threats To First Responders' Financial Health
What Should California First Responders Do To Prepare For The Changes Ahead?

Veterans

Why We Choose to Serve Veterans
How to Make the Most of Your Veterans Benefits
Everything Veterans Need to Know About the Thrift Savings Plan (TSP)
Financial Pitfalls Veterans Should Avoid
The Best Life Insurance Solutions for Veterans
Should You Enroll in the Survivor Benefit Plan?

Federal Employees

Why We Serve Federal Employees
How to Maximize Your Federal Employee Benefits
Everything Federal Employees Need to Know About the Thrift Savings Plan (TSP)
Financial Pitfalls Federal Employees Should Avoid
The Best Life Insurance Solutions for Federal Employees
How Federal Employees Can Plan to Retire on Time
Annual Enrollment For Government Employees
The Ultimate Guide To Financial Planning For Federal Employees

Teachers & Faculty

How Teachers Can Catch Up For Retirement In A Hurry
The Top 4 Regrets Teachers Have In Retirement
How To Maximize Your University of Kentucky Benefits Package
What are the differences between a 403 (b) plan and a 457 (B) plan
Ohio State university employees: How to maximize your 403 (b) plan

Women and Money

What Women Really Want In Retirement
If Widowhood Happened Tomorrow, Would You Be Prepared?
What To Do Before You Get Divorced
Social Security Claiming Strategies For Single, Divorced & Widowed Women
The Top Financial Concerns of Women Business Owners

Target By Issue

Financial Planning

Could A Charitable Remainder Trust Meet Your Philanthropic And Retirement Income Needs
The Benefits Of Using A Delaware Statutory Trust In A 1031 Exchange
How Could You Benefit From An Intermediated Installment Sale
Is a Vacation Home Really an Investment?
Does It Make Sense To Pay Off Your Mortgage Early?
Why You Should Consider Sending Your RMDs Straight To A Charity

Tax Planning

Could A Retirement Tax Advisor Help You Unlock The Retirement Of Your Dreams?
Your 2020 Tax Preparation Checklist
Tax Planning During Market Declines
IRS Resolutions: What To Do When The IRS Sends You A Letter
Could A Donor Advised Fund Save You Money On Taxes

Retirement Planning

Common Financial Mistake Pre-Retirees Make
The Top 5 Financial Planning Challenges In The First 10 Years Of Retirement
The True Cost Of Withdrawing Early From Your 401(k)
How Does Your Retirement Savings Compare To Your Neighbors'?

College Planning

Saving for Education During Market Volatility
5 Steps to an A+ College Plan
4 Common FAFSA Mistakes To Avoid
Should Grandparents Help Pay For College? Maybe Not

Intergenerational Planning

Financial Planning For Aging Parents
This Is Why Your Adult Children Need A Financial Plan
Have You Had The Financial Talk With Your Kids? We're Here To Help
You've Inherited Money, Now What Should You Do?
Should You Really Be Helping Your Adult Children Financially?
What Type Of Inheritance Are You Giving To Your Children?

Investment Topics

Are Index Funds Really As Great As Everyone Thinks?
Why Do People Really Buy Gold and What Are The Alternatives?
The Real Benefits Of Diversification

Real Estate

Why The 30-Year Fixed-Rate Mortgage Is Insane
Buying A House In Denver? Here's How Much You Can Afford
Thinking Of Buying A Home? How To Avoid Home Buyers' Remorse

Age-Specific Posts

What To Do The Day You Turn 62?
What Should You Do When You Turn 65?
Turning 70? Here's How it Will Impact Your Financial Plan

Social Security

Do You Have Questions About Your Social Security Benefits?
Your 2020 Social Security Planning Guide
Schedule Your Social Security Review Meeting Today!
Social Security 201: Receiving Benefits

Medicare

Medicare Open Enrollment Starts Soon; Here's What You Need To Know
Do You Have Questions About Your Medicare Plan?
How Medicare is Changing in 2020

Life Insurance

Treating Life Insurance as a Diversifying Asset Class
Four Reasons Why You May Be Due For a Life Insurance Review
Are You The Family Breadwinner? How To Make Sure Your Family Is Protected
It's All in the Math: Do You Have Enough Life Insurance
Could An Annual Review Of Your Life Insurance Policy Save You Money?

Long-Term Care

What Is Your Long-Term Care Plan?
One Client's Long-Term Care Story
Does Your Long-Term Care Plan Need an Audit?

Special Needs Planning

Financial Planning Challenges For Children With Special Needs
Our Special Needs Planning Partners
Six Steps to a Special Needs Plan For Your Family

Life Stages Planning

Life Stages Planning: Starting a Career
What To Do If You Get Laid Off
Life Stages Planning: Marriage
Life Stages Planning: Starting a Family
Your Parenthood Financial Checklist
Life Stages Planning: Divorce
Life Stages Planning: Grieving

Marketing in a Crisis

How To Manage Your Finances In A Crisis
What Should You Do Now About Your 401(k)?
4 Key Financial Lessons From The Last Recession
How To Protect Your Wealth During a Recession Or Depression
Strategies to Grow Your Wealth During the 2020 Financial Crisis
Worried About Your Financial Plan? Schedule a Q & A Call Today
Do Your Friends Or Family Need Financial Guidance? We're Here To Help!