

Transition Insights



Welcome to Transition Insights!

These final months of the year are often the busiest. In addition to the natural bustle of life, we add on all the holiday fixings like travel, shopping, or hosting family and friends. Mix that with inflation and market volatility, and top it all off with the cherry that is election season, and we've got the recipe for a big stressful sundae. Of course, this is why we plan. In stressful times or turbulent markets, we can rely on the strength of the plans we've created specifically for these seasons. Is it stressful to see your account balances swinging up and down?

Sure it is.

But we've been guiding clients through ups and downs for many years, and this year is no different. We're here for you so that you're there for your family during this special time of year. We bare the burden of a stressful market so that you can focus on the joy of the holidays.

Happy holidays, friends.



In 2022, as the world emerged from the COVID-19 pandemic, new economic uncertainties and challenges — spurred by soaring inflation rates, global conflicts and political discord — began to take shape.

Click below to download a summary of the most impactful tax planning opportunities to consider before year-end, involving your:

- Investments
- Retirement Plan Contributions
- Net Investment Income Tax
- Small Business Owners
- Charitable Donations
- Mortgage Interest
- Medical Expenses
- Flexible Spending Accounts (FSA)
- Health Savings Account (HSA)
- Child Tax Credits
- Inflation-Indexed Adjustments

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ARTICLES



Be A Savvy Senior: Know the Warning Signs of Elder Fraud

To keep yourself and loved ones safe from senior scams, ask yourself these questions before you transfer money.

[Read More](#)

VIDEOS

SAVVY IRA PLANNING

STRATEGIES TO HELP YOU SAVE TAXES AND GET MORE OUT OF YOUR IRA

A Webinar with Greg Sheehan AIF®, CFF®



A lot of people have a plan for accumulating money for retirement, but far too often, that's where the planning stops. That's not good enough. A plan for taking money out of your retirement accounts – is just as important, if not more so. Watch this webinar, as Greg informs you of the strategies to help you save taxes and get more out of your IRA.

[Watch the Webinar](#)

LET'S GET SOCIAL



END-OF-YEAR DEADLINES

DECEMBER 2022

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				01	02	03
04	05	06	07	08	09	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

RMD DEADLINE

CHARITABLE GIVING DEADLINE

ROTH IRA CONVERSION DEADLINE

Don't roll the dice.

We manage your investments with experience and discipline.

MEET THE TEAM



Gregory R. Sheehan, AIF®,
Certified Financial
Fiduciary®
Managing Partner /
Financial Advisor



Jean Kelley
Managing Partner /
Financial Advisor



Ryan Cerullo
Client Service
Associate



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