KING wealth planning, inc.
Retirement is a Journey. Let us be your Guide.

King Wealth Planning, Inc.
2105 S Bascom Ave. Suite 148 Campbell CA 95008
408.879.0789 www.kingwealth.com inquiry@kingwealth.com

Wealth eThoughts Newsletter www.finra.org/www.sipc.com LPL Tracking 1-05214941 Issue: XXXV

Retirement is a journey. Let us be your guide.

WEALTH eTHOUGHTS Newsletter

November 2021

IN THIS ISSUE

- Sigi Comeau
- GuidePosts
- What's Ahead

Sigi Comeau

"It's the friends we meet along the way that make us appreciate the journey."

It's a saying that encapsulates both how we feel about our clients and equally how we feel about the absolute pleasure it has been working with Sigi Comeau for the past 16 years. Many of you have expressed the same feelings in conversations regarding Sigi's pending retirement and the interactions you have had with her in your wealth management services.

Of course, the journey is a two-way path, and Sigi expresses her appreciation for each of you and her career as well. "We have the BEST clients!", Sigi says. "I have always appreciated the planning focus that we emphasized at King Wealth Planning; the wide variety of planning goals each of our clients have; and more than anything, sharing in the success stories of so many wonderful people."

We will enjoy Sigi's services through the end of 2021, and we hope she will join us for client events in the future. We can't thank her enough for her dedicated service to us and all of you. Sigi says "I am hoping to travel as the world opens up again. And I am excited to spend more time watching my 3-year-old granddaughter grow." And we are excited for you as well, Sigi. You have impacted so many lives and are a true credit to your profession.

Wishing you all a warm and wonderful holiday season,

Paul

Paul King, CFP®, CRC®
Registered Principal
LPL Financial

www.kingwealth.com
LinkedIn
Facebook
Twitter (@kingwealth)

Retirement is a journey. Let us be your guide. www.kingwealth.com

GUIDEPOSTS

Quarterly Guide to Financial Fitness

Fourth Quarter Focus 2021: Goal Planning

Goal Planning

What are your top priorities for the coming year?

- Savings?
- Life transitions?
- Long-term goal progress?

Let us know what priorities you would like to incorporate into your planning!

Below are a few planning actions to review before the end of the year:

Revise Estate Planning:

- Are your Durable Power of Attorney and Health Directive current?
- Have there been any additions to your family?
- Are there any special situations or needs you want to plan for?

How KWP can help:

- *We can review your beneficiary designations and account titling with you.*
- *We can provide resources for Professional Trustee services.*
- *We can coordinate joint planning with your Estate Attorney*

Plan your year-end gifting strategies:

- Annual gift exclusion amount is $15,000 per person, per recipient.
- You can donate from your IRA through a Qualified Charitable Distribution, up to a maximum of $100,000 per year.
- Consider adding to a child's 529 college savings plan.

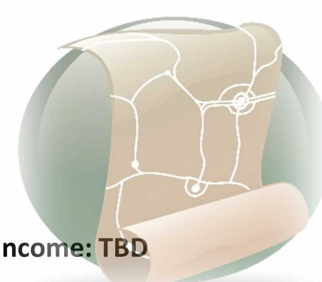
Other year-end planning strategies:

- Discuss Roth IRA conversion strategies with us.
- Maximize your retirement plan contributions.
- Ask your employer if they offer a Roth 401k option.

ACTIONS:

- For additional up-to-date planning strategies and client resources please visit our website: www.kingwealth.com.
- Call us to discuss any of the above strategies and how they fit with your personal planning needs.
- If you have family or friends who want to know more about how to save, invest and plan for their future, please have them give us a call.

King Wealth Planning continues to offer a series of webinars designed for you and your families! We are planning these webinars to keep you up to date on the latest financial topics and we've added some fun stuff too!



- **2022 Outlook: TBD**
- **2022 Tax Update: TBD**
- **Mid Year Outlook: TBD**
- **Managing Your Retirement Income: TBD**
- **Growing Trends in Travel: TBD**

We hope you will join us, from anywhere you are, for these fun and informative virtual events. We love doing these!