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August 2017 Issue of PFwise.com's Monthly Newsletter View this email in your browser

PFwise.com Monthly Newsletter

Help you make wise personal finance decisions

Hello friends, welcome to the August 2017 PFwise.com Monthly Newsletter, a compilation of a some blog posts we have published in the past month. Our goal is to provide you with information that covers a wide range of personal finance topics, such as insurance, investment, retirement, tax, ..., so you can make wise personal finance decisions!

Insurance Corner:

Combination Life Insurance Products

I compiled a list of insurance carriers and their products that combine some great features into one single product.

Advantages and Disadvantages of Universal Life

Previously, I compared the advantages and disadvantages of whole life insurance products, this month, I continued this comparison on Universal Life products.

Stroke / Hep C and Life Insurance

For people with stroke and/or Hep C, is it an automatic decline when applying for life insurance? These blog posts had a very detailed discussion about these two particular situations.

Investment Corner:

Best Options for Investments with Different Levels of Risks

We all know that high returns come with high risks. At each risk level (low, moderate, and high), what are the best investment options to choose? You will find answers here.

Top 50 Investment Books

Looking for an investment book as your summer reading? Here is a list of top 50 investment books recommended by MarketWatch.

Retirement Corner:

3 Retirement Plan Contribution Types

If you are confused about the various retirement plan contribution types, such as Pre-tax 401(k), Roth 401(k), and After-tax 401(k), you will find clear explanations of each of them here.

Qualified Plan to Qualified Plan Transfer Options

Believe it or not, I counted 11 different types of qualified plans. It will be a nightmare to track what are the eligible options to transfer funds among these plans. I have created a table that makes this task very easy.

Best Retirement Plan for Small Business Owners

Unfortunately there is no one answer that fits all. However, in this blogpost, I provide a general guideline for small business owners to follow ...

Tax Planning Corner:

IRS Imposters

This blogpost discusses several signs of IRS imposters and what you should do if you encounter one.

All Blog Posts:

If you want to read other blog posts that cover all the different areas of personal finance, follow this link.

For archived newsletters, check out here.

Thank you for your readership! I hope you could benefit from some of our publications.

If you like our newsletter, please share with your friends. They can subscribe by dropping a line to help@pfwise.com or click here.

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The Bottom Line

Personal Finance is a broad and complicated topic, and needs lot of knowledge and forward-looking planning. I hope I can share my knowledge and use my skills to help you make wise PF decisions.

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