PFwise.Com Monthly Newsletter - May 2018

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PFwise.com Monthly Newsletter

Help you make wise personal finance decisions

Hi, welcome to the May 2018 PFwise.com Monthly Newsletter, a highlight of a some blog posts we have published in the past month with the goal to help you make wise personal finance decisions!

Insurance Corner

3 Tax Advantages of Life Insurance
Do you know there are 3 major tax advantages of a permanent life insurance policy? They are discussed in these 3 blog posts.

Disability Insurance 101
Do you need individual disability insurance if you already have group disability coverage? This blog post answers the question, also a **disability insurance 101** here.

The Value of A Few Dollars
A **case study** from North American for someone 40 years old and contributes $200 a month till age 65 to achieve guaranteed death benefit and steady cash value build ups.

Investment Corner

5 Most Popular Portfolio Rebalancing Softwares
This blog post includes **5 most popular portfolio rebalancing software** used by financial advisors and these software's features.

Risk-based or Goal-based Investment?
While I was answering a question about robo-advisor, I found a discussion of **risk-based versus goal-based investment** relevant, you can think it over by yourself which one is appropriate for you.

Retirement Corner

Retirement Income Funds - Pros and Cons
Have you heard of a new class of mutual funds - retirement income funds? If not, here are **several blog posts** that discuss this new class of funds in great details.

The Little Know 401k Trick That Could Boost Your Retirement Saving Significantly
Do you know you might be able to contribute significantly more to your Roth IRA? See if **this little known strategy** works for you or not.

Tax Planning Corner

How to Check 1040 for Opportunities to Get More Money Out of It?
Are you done tax filing? Now it is time to check your 1040 and make sure you leave no money on the table. Don't know how to do it? Just follow this excellent **1040 strategy guide**.

A New IRS Tool to Determine Appropriate Withholding Amount
Are you done tax filing? Now it's time to check your tax-withholding amount is appropriate or not, especially given the tax law changes. It's easy to do, just use this **new IRS tool**.

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.

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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