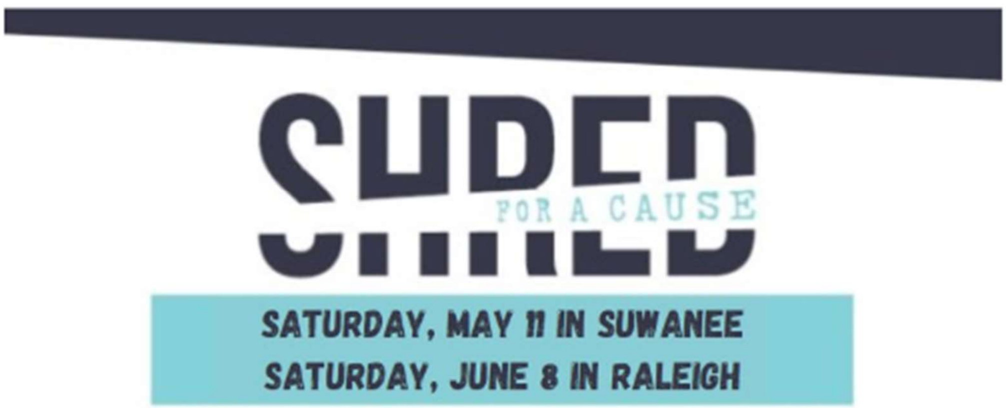
LIFETIME

Thank you for being part of the LifeTime family!

This newsletter features news & updates from our firm. Please let us know if there are additional topics you would like us to address in our newsletters.

Life at LifeTime

SAVE THE DATE for the LifeTime Shred Event in Your Area!



Do you need to get rid of old documents safely & securely? Want to get a head start on spring cleaning? At this event, you can do all these things while making a difference in our community.

Our Raleigh "Shred for a Cause" will be taking donations on behalf of **Wake County Smart Start**. Our Suwanee "Shred for a Cause" will be accepting donations on behalf of **American Cancer Society**. We suggest a donation of $5 for each box of recyclable paper or documents. **NOTE: Maximum of 4 boxes for shredding.**

Both shred events will be drive-through style in each office building parking lot starting at 10 A.M. We will have a document shredding truck on-site for paper and files during the events.

We hope that you'll save this date and plan to stop by with your old documents. Feel welcome to invite your friends and family to take advantage of this FREE service.

LifeTime Gives Back

LifeTime supports many local and national charitable organizations with donations throughout the year. Additionally, LifeTime made the Martin Luther King Jr holiday a "day of service" for our staff. A group of team members volunteered with Habitat for Humanity's ReStore on Monday, Jan 15. We helped to move donated furniture onto the floor for sale, then sorted and restocked the paint section. It is rewarding to give back to the community and hope you celebrated today in a fulfilling way.

The LifeTime Team Continues to Grow!

Join us in welcoming our newest team member:

Chloe Ruddo, Wealth Consulting Assistant

Chloe joined the LifeTime team on January 3, 2024. Chloe graduated from Virginia Tech in May of 2023 with a Bachelor of Science in Finance specializing in Financial Planning. She found her love for financial planning, seeing it as a career that deals with both finance and psychology. Chloe has always enjoyed working and talking with people, and she knew this would be the perfect opportunity to utilize her strengths. One of her favorite classes was behavioral finance, and she looks forward to using her knowledge and skills within this field. Read Chloe's complete bio here.

Our focus is on you, our clients — and as our team grows, so does our capacity to provide you with excellent client service. Thank you for helping to welcome these new faces into the LifeTime team.

Rebecca Crumpler, CPA, CFP® holds Co-Communications Director position for FPA of the Triangle

The FPA of the Triangle chapter is a membership organization and professional home for committed practitioners who want to master the practice of financial planning and help shape the future of the profession. The Board of Directors meets once a month to discuss chapter activities and consider recommendations for changes or new items.

Rebecca shares the responsibility of Co-Communications Director for Financial Planning Association (FPA) of the Triangle with Ali Doughtery. Rebecca is responsible for engagement during the chapter meetings. She is recommending more efficient ways for chapter members to communicate with one another and the group. Ali handles all social media engagement. They both serve on the FPA Chapter Board and have plans to create a program for their annual symposium.

There is a lot to celebrate in March. **International Women's Day** (IWD) is a global celebration that takes place annually on March 8th. This day is dedicated to recognizing and celebrating the achievements, contributions, and progress of women in various fields, including politics, economics, social, cultural, and scientific areas. First celebrated in 1911, this day also serves as a call to action to address the challenges and issues that women around the world continue to face.

Additionally, for the entire month of March, we celebrate **Women's History Month**, highlighting the often overlooked or underrepresented role of women in various fields and aspects of society. It provides an opportunity to honor the women who have made significant contributions to history, culture, science, politics, and various other areas. This year's theme is "Women Who Advocate for Equity, Diversity and Inclusion."

LifeTime is proud to honor our 11 female team members, two of which are of international heritage.

Do you love LifeTime, your Wealth Consultant and/or Tax Advisor? If so, provide a Google review!

We have many clients (both new and long-term) that have been pleased with our dedicated team, comprehensive services and unique investment/tax offerings and solutions. If you are one, we'd love for you to provide a Google review attesting to your experiences with LifeTime. Just click the button below! We appreciate your time and effort.

Raleigh:

We'd love your feedback! Please leave us a review.

Suwanee:

We'd love your feedback! Please leave us a review.

LifeTime Voted Raleigh's Best in Tax Services and Wealth Management Categories

We were pleased to have been nominated and thrilled to have WON Raleigh's Best in two categories for 2023.

LifeTime Tax won GOLD in Tax Services category

LifeTime Asset won SILVER in Wealth Management category

LifeTime Asset & Tax Management continues to create a stir by redefining the perception of wealth management. As a firm that features two distinct but interconnected entities, LifeTime Asset Management and LifeTime Tax Management, our mission is clear: to help build our clients' financial confidence through comprehensive financial planning, investment management, and professional tax services.

Read the complete article on Raleigh's Best website here.

** **2023 Raleigh's Best**, created by The News & Observer. Presented on October 29, 2023 based on nomination votes gathered from July 17 to August 4, 2023. 29 Wealth Management firms were considered, 3 Wealth Management firms were recognized. 21 Tax Services firms were considered, 3 Tax Service firms recognized. Advisors pay a fee to hold out marketing materials. Readers were able to vote once per day. Not indicative of advisor's future performance. Your experience may vary. For more information please visit, votedraleighsbest.com.*

Tax Clients: Looking for Financial Planning Services?

If you are a tax client interested in learning more about our financial planning and investment processes, you can schedule a no-cost initial consultation meeting with one of our Wealth Consultants. **Click here to schedule online!**

News & Updates

Shift from Zoom to Microsoft Teams for Virtual Meetings

At LifeTime, we are always looking for ways to make our time with you as productive as possible. To that end, we are changing the technology platform that we use for virtual meetings from Zoom to Microsoft Teams starting Monday, April 1, 2024. This platform is integrated with other Microsoft products that our team uses and will enable us to better collaborate to serve you.

This change requires nothing on your end. Like with Zoom, you don't need to download anything to join the Teams meetings. From the email invitation or the calendar entry, you can simply click the link to launch the app in your web browser. Of course, you're also welcome to download the app to your smartphone, which will enable you to join the meeting directly from your device.

Guide on How to Join a Teams Meeting

Tax Season Update

We are obviously in the middle of our tax season. The due date for individual tax returns this year is **Monday, April 15**. If you have not submitted any tax information yet, that means we need to hear from you so you can request an extension to file (until October 15). However the extension does not apply towards payment to the IRS, so you should make a payment by April 15 if necessary.

Tools You Can Use

We want to make sure everyone knows about **ShareFile** – our new secure way to send or receive your tax information easily and quickly. The asset side of our business has been using this tool successfully for years.

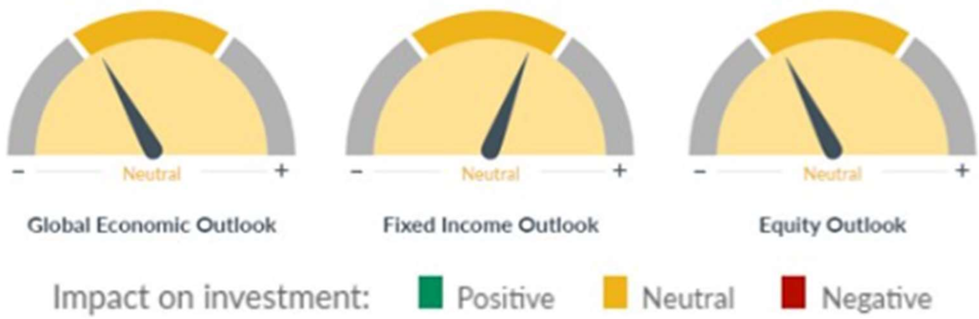
Also a reminder that our LifeTime Tax team members are now using the **@lifetimeasset.com** email address.

- Mark Girimonte can now be reached at mark@lifetimeasset.com
- Josie Jiang can now be reached at josie@lifetimeasset.com
- Rebecca Crumpler can now be reached at rebecca@lifetimeasset.com
- Ben Walden can now be reached at ben@lifetimeasset.com
- Heather Poe can now be reached at heather@lifetimeasset.com

If you have any tax questions please contact Heather Poe at heather@lifetimeasset.com.

City National Rochdale Speedometers℠ for March 2024

If you are already a City National Rochdale client, you are already familiar with their speedometers. Below are the economic indicator dials from CNR for March 2024. See their complete economic outlook here along with a great video discussing these Speedometers.



Market Thoughts Video for March 2024 from Brad McMillan, CFA, CAIA, MAI

Stocks performed well in February, with most markets up in the low- to mid-single digits. The Nasdaq and emerging markets did especially well, but fixed income declined as interest rates rose. Job, income, and spending growth remained positive, but these results kept inflation up. As we enter March, will markets continue adjusting to the expectation of slower rate cuts? Watch Brad McMillan's video here.

Commonwealth

Market Updates

Weekly and Monthly Market Updates are available on the LifeTime website and on our Facebook page.

Social Media

Join the LifeTime community on Social Media. In addition to Weekly Market Updates, you'll find articles on a variety of topics from the strength of the housing market to why ice cream is so addictive. Click on the icons below to get started.

Join our Facebook family

Connect with us on LinkedIn

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