NEWSLETTER | Issue 24 | Q2 2024

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

Congrats to Matt Glova, CFP®, for being Named to Forbes Best-In-State Wealth Advisor List for 2024 for a Sixth Consecutive Year

Matt Glova has been named to Forbes' Best–in–State Wealth Advisors list for 2024. The list is published on forbes.com/best-in-state-wealth-advisors. This is Matt's sixth consecutive year earning this prestigious award, starting in 2019.

See Matt's profile here. | Read more about this award here.

Please join us in congratulating Matt on earning the prestigious award again for 2024.

* **2024 Forbes Best In State Wealth Advisors**, created by SHOOK Research. Presented in April 2024 based on data gathered from June 2022 to June 2023. 23,876 were considered, 8,507 advisors were recognized. Not indicative of advisor's future performance. Your experience may vary. Click here for more award information.

Double the Shred Events, Double the SUCCESS!

Our Raleigh Shred Event was a bit later than usual this year, but that gave us great weather. On June 8th, our 11th Annual Shred for a Cause in Raleigh had a great turnout with much higher participation than anticipated. We filled the entire shred truck before the event end time due to this great attendance. With LifeTime's donation, this event raised $2,000 for Wake County Smart Start's early education programs.

Our 2nd Annual Shred Event in Suwanee was hosted in May with a good turnout of participants getting their documents shred on-site. Suwanee's Shred for a Cause event raised $1,000 in donations to the American Cancer Society.

Thank you to everyone who came out and donated to these great organizations.

LifeTime Gives Back on Juneteenth

LifeTime supports many local and national charitable organizations with donations throughout the year. Additionally, LifeTime made the Juneteenth holiday a "day of service" for our staff. A group of team members volunteered with Habitat for Humanity's ReStore on Glenwood Ave on Wednesday, June 19. We helped clean and organize their showroom, took hardware off donated doors, removed broken items and more. Luis runs a tight ship and is a great store manager! It is rewarding to give back to the community. We hope you celebrated in a fulfilling way.

Suwanee, GA Clients Invited to an Educational Dinner on Investing in an Election Year

Investing in an election year presents unique challenges due to increased market volatility and uncertainty surrounding policy changes. As November 2024 approaches, election noise will only increase, making it crucial for investors to maintain focus on their long-term goals.

This educational event can help answer some of your most pressing questions, including:

- Is one party better than the other for investors?
- Do politics impact specific stocks or asset classes?
- Are there observable trends from past election cycles?

We hope you can join us!

When: Tuesday, July 30, 6 pm

Where: The 1818 Club, Duluth, GA

Keep an eye out for our email invitation in your inbox soon!

Raleigh Area Clients Invited to a Mid-Year Market Update & Outlook

Chris Fasciano, Senior Portfolio Manager with Investment Management & Research at Commonwealth Financial Network will present a Mid-Year Market Update and Outlook for our Raleigh area clients. One topic of discussion will be how the upcoming election may impact the markets. We will host both a lunch and dinner session so you can attend the one that works best with your schedule.

We hope you can join us!

When: Thursday, Aug 1, Lunch session at 11:30 am or Dinner session at 6:00 pm

Where: Spark Training Room, 701 Corporate Center Drive, Raleigh, NC

Keep an eye out for our email invitation in your inbox soon!

See What Others are Saying About LifeTime!

Read here what others have said about LifeTime! If you would like to leave a review for 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.

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

News You Can Use Article Library

LifeTime has developed a series of articles on key topics that are important to our clients. If one of these topics is important to you, be sure to read the related articles to get all the details.

- Smart Tax Saving Strategies
- Common Retirement Mistakes
- When is the Best Time to File for Social Security?
- Spring Clean Your Financial Plan
- What Kind of Charitable Donor are You?
- Understanding Medicare, Medigap and When to Enroll
- Tips for Protecting Against Identity Theft
- Estate Planning Must Dos
- College Savings Strategies
- New articles added regularly, so be sure to check back!

Tax Talk: Understanding the Corporate Transparency Act (CTA) and Beneficial Owner Information

The Corporate Transparency Act (CTA), effective January 1, 2024, will affect approximately 32 million companies in the United States. Under this legislation, impacted legal entities must report information about their beneficial owners and controlling parties, among other information, to the US Department of Treasury's Financial Crimes Enforcement Network (FinCEN).

LifeTime Tax Management will not be offering this service to our clients. However, we want to ensure you are aware of this new requirement in case you haven't already heard about it.

We are not providing this service as we believe it falls into the realm of legal services more so than accounting services.

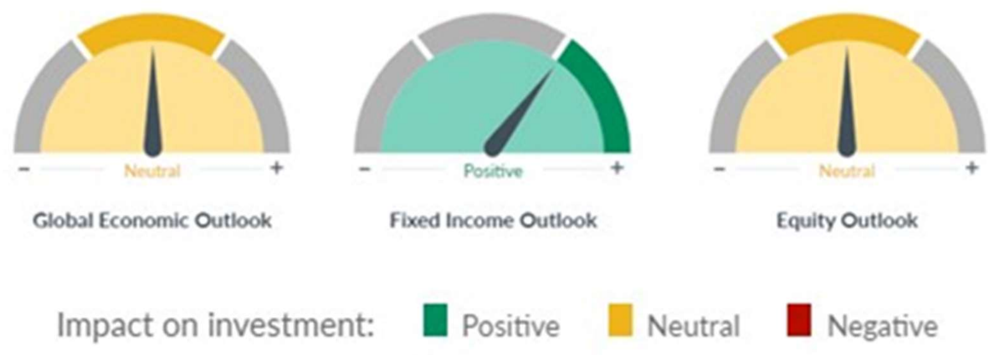
Here are two links to government website that explain these requirements:

https://www.fincen.gov/boi

https://www.fincen.gov/boi-faqs

City National Rochdale Speedometers℠ for June 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 June 2024 from Brad McMillan, CFA, CAIA, MAI

Most stock indices were up from 3 percent to 6 percent in May, and the S&P 500 and Nasdaq reached new all-time highs. The April employment report and declines in consumer and business confidence helped calm investor concerns about inflation and took interest rates down a bit. Companies showed strong earnings growth, providing a solid foundation for the market. With slower economic growth and stable market fundamentals, will we see continued expansion in June? Watch Brad McMillan's video here.

Commonwealth

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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.

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