

Ridgeline Financial Partners

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RFP Monthly

Timely Financial Considerations

June 2016

Our firm was honored to have managing partner Matt Carbray included in the Best of Hartford Magazine issue this month. Matt was named the 1st runner up in the financial planning category. Thank you to all who voted! As an ongoing commitment to client service and education, please follow our updates and articles on social media. We have also launched a new twitter account, @ridgelinfp, to help us keep you up to date with the latest news in financial planning. We handpick content we feel will relate to our clients. Please send us your thoughts and feedback as we try to become the best financial planning firm in Hartford County!

[Projecting a Happy Retirement](#)

Having a realistic picture of your retirement income and expenses could increase your chances of enjoying a happy retirement.

[More Details](#)

[Debt Optimization Strategies](#)

In these uncertain economic times, you may be thinking of reducing your debt load. There are a number of strategies for paying off debt that you might consider.

[More Details](#)

[Common Financial Wisdom: Theory vs. Practice](#)

In the financial world, there are a lot of rules about what you should be doing. In theory, they sound reasonable. But in practice, it may not be easy, or even possible, to follow them.

[More Details](#)



[Can I make charitable contributions from my IRA in 2016?](#)

Taxpayers age 70½ or older can exclude from income up to \$100,000 of otherwise taxable distributions paid directly from an IRA to a qualified charity.

[More Details](#)



[Can I name a charity as beneficiary of my IRA?](#)

You can name a charity as beneficiary of your IRA, but be sure to understand the advantages and disadvantages.

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