



### Weaver Financial

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## Curated Nuggets From Weaver Financial

You'll likely enjoy 1 or 2 of these. Here's a compendium of financial planning and investment podcasts/articles that I've reviewed recently which I felt others might find interesting too. Each is notable for one reason or another.

To tap these as they're posted, follow Weaver Financial's Facebook page [here](#), or connect with me on Linked In [here](#).



**Paying for college** can be daunting for some. I help my clients use 529 college saving plans for kids and grandkids, and we start early. Here's a Wall Street Journal podcast that can help you define and prioritize your savings options. Listen [here](#).

YOUR MONEY  
BRIEFING



WSJ

## BARRON'S

Retirement is usually a momentous shift for any client I've worked with. Barron's just published a couple of thoughtful articles for that. Read **Get A Job In Retirement. It'll Help Your Wealth and your Health** [here](#). Read **Four Retirees and their Second Acts - A Ukelele Teacher and a Wood Worker** [here](#).

YOUR MONEY  
BRIEFING



WSJ

The Wall Street Journal covered a common issue with some couples I work with. **Don't agree on everything when it comes to finances?** Here are some solutions. Listen [here](#).

## BARRON'S

We use sustainable investing in the portfolios for some of my clients - to varying degrees. My weekend Barron's reading had this nice gem on **5 of the Best Books on ESG and Impact Investing** if you're like-minded. Read [here](#).

The administration's **new tax proposals** cover a lot of ground, but it's up to Congress to turn the proposals into actual legislation. What's the potential impact for investors? Here's Schwab's take. Read [here](#).

charles  
SCHWAB

Here's a light dive into the **tax benefits and other features of the 529 college savings** plan. Some of my clients use these for kids or grandchildren. Remember to setup the successor custodian! Listen to Wall Street Journal's podcast [here](#).

YOUR MONEY  
BRIEFING



WSJ

## CFA Institute

Watch this pre-recorded CFA Institute webinar and learn how to **incorporate climate change risk into your investment** process. Watch [here](#).

**Maximizing social security** is something we analyze for our clients, and it's different depending on each situation. But many people lose that edge by starting too early. Here's an excellent podcast from the Wall Street Journal on the basics. Listen [here](#).

YOUR MONEY  
BRIEFING



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Both clients and colleagues had incidents of some **fraudster claiming unemployment benefits** in their name. Here's a Wall Street Journal podcast on steps to take. Listen [here](#).

## BARRON'S

**Does investing ESG make a difference?** A person in the audience asked me that when I was giving a presentation on sustainable investing once. Here's an article from my weekend Barron's reading that shows the impact. Read [here](#).

Q1 was broadly negative for bonds, and some clients may suggest **abandoning their fixed income investments**. Learn why Vanguard's experts disagree. Read [here](#).

Financial advisors

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## BARRON'S

Good information for us financial planners, and our clients! **Defined benefit pensions** aren't always what they promise. Here's Barron's article Pension Plans Are Looking Healthier But That Probably Won't Last. Read [here](#).

## CFA Institute

Watch this pre-recorded CFA Institute webinar to find out **how pension systems** around the world deal **are affected by the Covid-19 pandemic**. Watch [here](#).

## MORNINGSTAR Advisor

It's Earth Day! I've long constructed **portfolios with sustainable investments** for clients. Morningstar has solid research that lets me do that. Here's a nice article with links to their resources. Read [here](#).

## THE WALL STREET JOURNAL.

When a client's retirement projection looks excellent, and some of their beneficiaries are individuals, **using the annual gift exclusion** makes sense. This Wall Street Journal article nicely explains some basics. Read [here](#).

The  
Economist

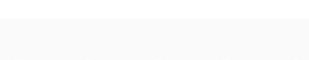
The Economist should be a favorite for anyone investing overseas. Those of us financial planners who diversify client portfolios, and include **investments abroad**, have to approach those markets differently. This excellent article covers some of the reasons why. Read [here](#).

When **checking your investment portfolio**, how do you really know how you're doing? Learn more about checking performance. Watch [here](#).

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