

# HOFFMAN PRIVATE WEALTH GROUP

at Steward Partners



## What to do with Investments when blood is in the streets!

As we near the end of the tax season, the deadline for making contributions to IRA, Roth IRA, and SEP accounts for the 2022 tax year is fast approaching. If you are married and your spouse does not work, you may be able to make contributions for them also, based on your income. Not only will it help you reduce your tax liability, but it will also provide you with a valuable opportunity to invest for the future.

Additionally, given the recent market downturns, now may be an especially smart time to consider aggressively adding for the 2023 tax year contributions, and after you have maxed your tax advantaged contributions add to your non-IRA and Trust investment accounts. Taking advantage of opportunities like we have today and investing during a market downturn can provide you with the potential for greater returns over the long term. We only see these opportunities every 8 to 10 years, it is a mistake to not take advantage if you can. It is also time to review what you own for an UPGRADE.

*The Hoffman Private Wealth Group can help make informed decisions about your finances, if you would like to learn more contact us at 727-351-5323 or click on the link below to schedule an appointment to talk with one of our specialists.*

<https://calendly.com/todd-hoffman/30min>

or call toll free (844) 367.1613, or direct (727) 351-5323

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