

Newsletter | November 2020



Team Time

Your **Shakespeare Voting Team** takes their voting rights seriously. Every vote counts. Here's how we did it this year:

Andrea | Chad and Andrea voted early on October 22nd. They waited in line for about 10 minutes.

Brian | Mailed in his ballot as soon as he received it. Convenient and efficient! Also felt much more informed about down-ballot candidates because he was able to research their platforms in real-time.

Brittany | Election Day, in West Allis after work. Long lines. Electric atmosphere. Heard some West Allis locations were handing out pizza, but sadly, she missed her slice.

Colleen | Early voted on October 22nd in Pewaukee Village. In and out.

Abundance of COVID protection measures.

Kevin | Kevin and Chris voted in-person at the Village of Summit on October 30th. No line - in and out in 5 minutes. What an enjoyable experience! We're incredibly blessed to live in a country where we have the right to vote!

Nick | *Walked right up in Wauwatosa and cast his vote in-person on Election Day.*

Ryan | Voted on Election Day in the City of Hartford. Very quick process, spent more time driving to the polls than actually at the polls!

(Read to the bottom to learn some things we are thankful for this year!)

Coming Soon!

Year-End Planning Webinar - To be scheduled the week of December 7th - Stay tuned for further details!

Recent Blogs | View From The Lake



[Establishing Residency for State Tax Purposes](#)

This article is the first of a two-part series. Part 1 focuses on how to establish residency for state tax purposes. Part 2 focuses on the tax impact of changing state residency. We are commonly asked questions surrounding how to establish tax residency in a new state. Whether

buying a new primary home,
purchasing a [...] [Read More](#)



[Guest Blog – Home Care Assistance v. Assisted Living: Which is Better?](#)

Home Care Assistance v. Assisted Living: Which is Better? This conversation occurs on the regular with clients and Elder Care Advocates on the Vesta Senior Network team. Who can blame her for not wanting to leave the home that she has lived in for 40, 50 or even more years? Honestly, I remember when my [...] [Read More](#)



[Year-End Charitable Giving Reminders](#)

2020 has been a unique year in many aspects. COVID-19 has created many problems, including delays in processing certain transactions. As we approach year-end and you think about any final charitable donations you want to make for this tax year, it's important to have a plan in place for making a timely donation. Be sure that you make those donations early enough so that [...] [Read More](#)

Congratulations to **Nick** - the new **President** of the Financial Planning Association (FPA) of Wisconsin.

The mission of The Financial Planning Association of Wisconsin is to promote the [financial planning process](#) and advance the financial planning profession in accordance with the highest ethical standards by providing education, association, and leadership for the financial services community and the public it serves.



Nick's Tip of The Month: 2021 Social Security and Medicare Premium Increases

Social Security recipients will see a 1.3% cost of living adjustment for 2021; while Medicare Part B premiums will be increasing by \$3.90 to \$148.50. This represents a 2.7% increase, although it could have been higher, as a provision in a recent government funding bill limited the increase to 25%

of what it otherwise would have been, attempting to offer additional relief during the COVID pandemic. The annual Part B deductible will also increase – by \$5 to \$203.

Out and About



Big news in **Andrea's** family! Her daughter Claire was accepted to the University of Minnesota's nursing program. We are all so proud of her!



Colleen and the rest of the Shechem Committee at Hope Street Ministry's **groundbreaking ceremony** for the coming [Shechem Community Center](#) at 26th and Capitol in Milwaukee!



Ryan on the Pacific Ocean Coast in Northern Oregon!



Meanwhile, **Brittany** went to California to cut her own Christmas tree! ;)

While in Washington, **Ryan** hiked to MANY waterfalls.



Brittany and her Uncle Bryan may or may not have bungee jumped from this bridge when they were out west. Next time, we told her not to tell us about her adventures until she is safely on the ground!



Kevin and Chris sporting their masks and their fresh Voting Stickers!



Kevin and Chris again, this time out enjoying the fall colors at Holy Hill.



And finally, a photo of the **Bulen Family Climbers**... because there's no tree too tall!

Brian wanted to show off his two beautiful nieces. Can you blame him?

Health, Wealth & Happiness

Health, happiness and wealth depend on each other. To reach your goals of a happy retirement, do not overlook the value of a healthy retirement. More than 80% of today's retirees say health is the most important ingredient for a happy retirement (valuing good health even over financial security).

November's Tip for a Happy Retirement - Give yourself a boost of energy!

Loved this email from ActivatedYou so much I had to share it with you.

What do you do when your energy just drops for no reason?

Now, I'm not talking about feeling exhausted at the end of a long, busy day...

I'm talking about feeling wiped out and losing focus halfway through the afternoon – when you need to be at your best.

When that happens, **you need to boost your energy FAST.**

And for a lot of people, the obvious answer to that “3pm slump” is caffeine, or sugar... they perk you up fast.

But honestly, they're just postponing a bigger crash later.

Now, a walk around the block can help... but sometimes it's impossible to drop everything and take a stroll.

So what should you do? Well, I've got a trick that's shockingly simple, and there's a HUGE bonus... *you'll brighten someone else's day, too.*

Take a break from your work, and pay someone else a genuine compliment.

It doesn't take long – just a minute – and you can do it just about anywhere.

Maybe your coworker is doing a fantastic job with a big project, or your spouse looks especially nice today.

Or maybe the complete stranger in the checkout line at Target is wearing an incredible pair of shoes.

It's something I started doing when I felt tired on set... and it turns out, there's some actual science behind it.

In fact, a study published in the *Harvard Business Review* showed that a positive interpersonal reaction will boost your energy WAY more than a snickers bar... or a cup of joe.

And it'll make someone else's day too.

So do me a favor – next time you feel tired, pay someone a genuine compliment.

You'll boost your energy, and who knows... you might turn their day around, too.

To a healthy, balanced life.



grateful for you

HAPPY THANKSGIVING!

There are so many things we remain thankful for during these crazy times. Here are just a few of them:

Andrea is thankful for the sport of cross country, which has had an amazing impact on her life. She's happy to say her two oldest children are now participating as well; and their coaches worked so hard so that kids could train and compete in a safe manner this fall. She's also thankful for 2020. "I know this sounds crazy, but 2020 has forced us to slow down a bit and prioritize what really matters. It has challenged us to be creative and so many have met that challenge. We've spent more time doing things we never would have discovered otherwise. It has (hopefully) made us realize how blessed we really are. I hope we can take those things forward into 2021 (covid and his buddies can stay in 2020)."

Brian is thankful to be able to spend time with his family and friends and that everyone has been able to remain healthy. He's also grateful for the opportunity to be able to add a puppy and kitten to the family... everyone is really excited for that!

Britany is thankful that her family is local and have instilled holiday traditions that they can continue this year to help the holidays feel "normal," even during these very "not normal" times. She's also thankful for her Amazon Prime

subscription that makes her Christmas shopping a breeze!

Colleen is very thankful for all of the family, friends and animals in her life, old and new. She also sent up a heartfelt message of thanksgiving when the pear she was packing for lunch rolled off her counter, and fell onto a soft sandal before hitting the hard floor (preventing a mushy pear)!

Kevin is thankful that his children are in good health and thriving as young adults. He's also thankful for his lawn and garden equipment... a modern lawn mower warrior!

Nick is thankful for all the teachers (including his wife Jessie) doing their best to accommodate; and to have our kids in school, even if it's just a few days a week.

Ryan is thankful to have a great group of friends and family. He is also thankful to be moved out of his apartment and into his new home... now he can yell as loud as he wants while watching Packer and Badger games!

Shakespeare gives thanks for the trust and confidence you have placed in our team. We appreciate you!!

