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Profectus Financial and Profectus Wealth Management are proud to announce that we are officially accredited by the Better Business Bureau (BBB). BBB accreditation is one of the ways we would like to communicate the integrity and transparency of our business. Many thanks to all of our valued clients who have entrusted us and supported us along the way.

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은퇴자금 통합운영의 이점과 방법

As written by Kelly Woo, CFP®

In this article, Kelly discusses benefits of retirement account consolidation and how to proceed with consolidation to avoid possible mistakes and increase individual retirement account management efficiency.

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SEP IRA vs Solo 401(k)

As written by Kelly Woo, CFP®

SEP IRA and Solo 401(k) are both popular retirement options for small business owners and independent contractors, and/or freelancers that would like to reduce taxable income from their business and build retirement assets. In this article, Kelly compares the similarities and differences and explains which may be more suitable than other for a particular business owners.

Industry News



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Crowe Offers Year-End Tax Planning Guide After TCJA

With the launch of the [Tax Cuts and Jobs Act](#), there have been reductions made to income tax rates for a number of individual tax brackets, while simultaneously decreasing income tax rates for corporations. It is best advised to consult and work closely with a financial advisor to navigate and strategize towards benefits and minimize negative tax ramifications.

(Source: [TaxProToday](#))



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Retirees Lack Awareness of Income Tax Hits: Nationwide

A recent survey from Nationwide Retirement Institute displays a high percentage of retirees lacking understanding about possible tax effects on their retirement. More than a third of retirees are unaware of how taxes will affect their retirement income. A growing number of retirees and pre-retirees are showing increased interest in retirement planning.

(Source: [ThinkAdvisor](#))

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