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## Strategic Planning Meeting

<b>Meeting Start</b>	December 7, 2023 12:00 PM	<b>Meeting End</b>	December 7, 2023 04:00 PM
<b>Location</b>	Zoom	<b>Attendees</b>	John Mason

Please upload documents needed for planning: [Click here to upload](#)

- Paystub / LES
- SS benefit verification letter / monthly benefit details (gross; taxes; Medicare)
- IRMAA Letter and Estate Documents

Please describe any life or situation changes we should be aware of:

My parents are getting older and have long term care policies in place that they are refusing to use. I don't know anything about long term care but it seems like more of our time is going to be dedicated to making sure they have the care they need

Topics, issues or questions for discussion:

- Roth conversion
- Federal and state tax withholding amounts
- Short-term / long-term realized gains and losses
- Social Security planning
- Estate planning / legal documents / beneficiary designations review
- IRMAA limits / IRMAA appeal

### Advisor Questions

- **Question:** Are you prepared to initiate a similar Roth conversion this year?
  - **Answer:** YES!
- **Question:** I anticipate you are in the second tier of IRMAA. Did you receive a letter from SSA?
  - **Answer:** I did- I hate IRMAA
- **Question:** Are you planning to sell you rental property in 2024?
  - **Answer:** Yes, the lease expires in June and we'll be moving to sell it in August after repairs
- **Question:** Can you please upload copies of your recently created estate plan and any instructions the EP attorney may have provided?
  - **Answer:** Yes. Thank you for referring us to the wonderful estate planning attorney.

Please use the following space to provide any additional notes or details:

The estate planning attorney provided a list of recommendations and actions after we created our new estate planning documents. Can you help us implement / What do we need to do on our own?



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