

Simplified 360°

Welcome to Simplified 360.

We're excited to introduce this new way of communication to our clients.

Your relationship with our firm matters to us, and we cherish the moments we get to spend working with you. We look forward to building upon that by sharing relevant ideas and information that help bring clarity to an increasingly chaotic world.

As we engage in these thoughts, reach out to us with any questions or comments. We really do love hearing from you.

We hope you'll find each month's letter enjoyable and informative.

Always here for you,
The Simplified Wealth Team

Articles

Smart Ways to Save for Your Child's Education

If you're a parent, the start of a new school year may have you considering how much you're able to set aside for your child's college fund. Fortunately, there are several alternative approaches parents can take to put away money for their children's education. In this article, we'll take a look at the different options you can choose from.

[Read the Article](#)

Understanding the Charitable Remainder Trust

The charitable remainder trust (CRT) is a popular retirement- and estate-planning tool. It can be a convenient way to create a stream of lifetime income for yourself and others or donate to a charity while minimizing and deferring taxes. But there are many choices to make when establishing a CRT and, in some cases, these tools may not be right for everyone. Read the article to see if it's right for you.

[Read the Article](#)

Simply Social



Keep in Touch!

Email: contact@simplifiedwealth.com | Phone: (951) 284-4900
Fax: (951) 284-4990



Copyright © 2022 Simplified Wealth Management, All rights reserved.

Our mailing address is:
391 N. Main Street, Suite 107
Corona, CA 92878

Want to change how you receive these emails?
You can [update your preferences](#) or [unsubscribe from this list](#).