

Link to video: <https://youtu.be/8cBEtMeXllw>

Link to handout: <https://www.aaii.com/files/images/20201216-YearEndPlanning.pdf>

AAll Articles

[Helpful Steps My Late Father-in-Law Took](#)

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[Estate Planning Articles Archive](#)

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[Optimizing Retirement Withdrawals Using the Level3 Strategy](#) (Jim Cloonan)

[For Portfolio Reviews, Look at Only What You Need To](#)

[17 Financial and Investing Moves for 2020](#)

[Roth Versus Traditional IRA](#) decision tree

[IRA Rollover Chart: Rules Regarding Rollovers and Conversions](#)

[The Individual Investor's Guide to Personal Tax Planning 2020](#)

Other AAll Resources

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[My Portfolio tool](#)

[Jim Cloonan Tribute Wall](#)

["Investing at Level3"](#)

Charles' weekly [Investor Update](#) commentary

[Webinar on Tax Issues](#)

Other Resources

[RMD Rules](#)

[IRS Website](#)