

Link to video: <https://www.youtube.com/watch?v=MiSrBPJK3Cw>

Roth IRA Conversion

[Can a Roth IRA Conversion Save You Money?](#) by Roger Young in the September 2021 *AAll Journal*

[Converting to a Roth IRA Can Minimize RMDs](#)

[Inherited IRA Rules Before and After the SECURE Act](#)

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

[Tax-Efficient Withdrawal Strategies](#) by Roger Young, T. Rowe Price, May 2021

Update Your Estate Plan for Your IRAs by Ed Slott, to come in the October 2021 *AAll Journal*

[See Roger Young speak at the upcoming virtual Investor Conference 360](#)

Strong Small-Cap Value Funds

[Small-Cap Funds Showing Strong & Consistent Relative Performance](#) by Matt Bajkowski in the September 2021 *AAll Journal*

[Is the Small-Cap Stock Premium Disappearing?](#)

[Guidelines for Selecting Mutual Funds and ETFs](#)

[Understanding Mutual Fund Fees and Expenses](#)

[Which Funds Fit Your Needs? Here's How to Decide](#)

[Top Considerations When Comparing Funds](#)

[Definitions of Terms for Mutual Funds](#)

Choosing Bonds With PRISM

[Guidelines for Selecting Bonds and Cash-Like Instruments](#) by Charles Rotblut in the October 2021 *AAll Journal*

[Choosing Between Bonds and Bond Funds](#)

[The Risks of Investing in Bonds](#)

[A Fresh Look at Defined-Maturity Bond Funds](#)

[Challenge Your Perspective on Bonds](#)

[Using Bond Ladders and Income Annuities for Retirement Income](#)

[Using Cash and Short-Term Bonds to Avoid Taking Losses in Retirement](#)

[See Charles Rotblut speak at the upcoming virtual Investor Conference 360](#)

Mailbag

Send your questions to kwurf@aaii.com