

Link to video: <https://youtu.be/e7PYntU33no>

Links to handouts:

<https://www.aaii.com/files/images/2025-11-25-Charles-Rotblut-Tax-Strategies.pdf>

<https://www.aaii.com/files/images/Powell-Personal-Tax-Planning-Nov-2025.pdf>

<https://www.aaii.com/files/images/Christi-Powell-Scenario-Example-1.pdf>

<https://www.aaii.com/files/images/Christi-Powell-Scenario-Example-2.pdf>

[“The Key OBBB Act Tax Changes for Individual Investors” by Charles Rotblut](#)

[“What the One Big Beautiful Bill Act Means for Your Taxes” by Charles Rotblut](#)

[“An Investor's Guide to Understanding 1099 Tax Forms” by Cynthia McLaughlin](#)

[“For Qualified Charitable Distributions, Timing Is Everything” by Brian Dobbis](#)

[December 2025 *AAll Journal*](#)

[AAll 2025–2026 Tax Guide](#)

Special Offers

[AAll’s Special Offer on A+ Investor \(AAll Plus\)](#)

[BetterInvesting’s Special Offer on Membership](#)