



Year-End Checklist

The 4th Quarter can be the ideal time to review your financial situation. Please take a few short minutes to read through the Checklist of items to consider before the end of the year and think about for the coming year.

<p>TAXES</p> <ul style="list-style-type: none"> <input type="checkbox"/> Project Income for this year <input type="checkbox"/> Collect cost-basis information on sold securities <input type="checkbox"/> Review sales of appreciated property like real estate & art <input type="checkbox"/> Review potential deductions and credits <input type="checkbox"/> Track donations to charity and review any gifting plans 	<p>RETIREMENT</p> <ul style="list-style-type: none"> <input type="checkbox"/> Max out 401(k) contributions including catch-ups <input type="checkbox"/> Max out IRA contributions including catch-ups <input type="checkbox"/> Analyze Roth IRA conversion scenarios <input type="checkbox"/> Take required minimum distributions <input type="checkbox"/> Open a retirement plan if newly self-employed <input type="checkbox"/> Consider social security claiming options
<p>Investments</p> <ul style="list-style-type: none"> <input type="checkbox"/> Confirm investment goals & strategy <input type="checkbox"/> Review portfolio positions <input type="checkbox"/> Review asset allocation for rebalancing opportunities <input type="checkbox"/> Revisit income & savings needs <input type="checkbox"/> Review outstanding loans & mortgages <input type="checkbox"/> Review employee stock options 	<p>FAMILY</p> <ul style="list-style-type: none"> <input type="checkbox"/> Contribute to education accounts <input type="checkbox"/> Review & fund trusts <input type="checkbox"/> Make any cash gifts to family members <input type="checkbox"/> Plan charitable contributions <p>INSURANCE & HEALTH COVERAGE</p> <ul style="list-style-type: none"> <input type="checkbox"/> Review costs of current insurance policies <input type="checkbox"/> Review Health Savings Acct. <input type="checkbox"/> Identify changes in life, business, or financial circumstances that may require insurance adjustments <input type="checkbox"/> Review Medicare enrollment options
<p>CHANGES</p> <ul style="list-style-type: none"> <input type="checkbox"/> Did you move/refinance your home? <input type="checkbox"/> Did you sell a major asset like your home, business, or other real estate? <input type="checkbox"/> Did you transfer any major financial assets? <input type="checkbox"/> Did you change jobs? <input type="checkbox"/> Did you get married/divorced/add to the family? 	<p>CHANGES (cont.)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Did you lose a loved one? <input type="checkbox"/> Do you have a parent or other family member in need of assisted living? <input type="checkbox"/> Is there a severe illness in the family? <input type="checkbox"/> Did you receive a gift or inheritance?

Priebe Investment Plans invites you to a



**On Tuesday,
November 23rd
12 noon**



We invite you to join us in our Fort Lauderdale office for an educational presentation.

Topic:

TOPIC:
Charitable Giving

Join us for a friendly discussion. **Bring your spouse, neighbor or friend.** Walter Priebe will have a short presentation and will be available to take any questions. Seating is limited. Lunch will be served.

Please call our office, 954.974.3266 to reserve your seat or to get a link to the LIVE zoom meeting.

Office Address:

2933 W. Cypress Creek Rd.
Suite 102
Fort Lauderdale, FL 33309



Referrals! Referrals! Referrals!

We love referrals!! Please tell your family, friends, or neighbor that Walter Priebe will buy them lunch for an opportunity to introduce himself and offer his services and expertise. Two dates are being offered this month. We invite you and a friend or neighbor to come on by for a

quick introduction, order lunch to go and allow him the opportunity for a no-cost, no-obligation first appointment at a later date at your convenience. Please call to book your next lunch with Walt!

Thursday, November 4th

Landshark Bar & Grill @ Margaritaville
1111 N. Ocean Drive
Hollywood, FL
12pm-2pm **LUNCH**

Thursday, November 18th

Maggiano's Little Italy
21090 St. Andrews
Boca Raton, FL
12pm-2pm **LUNCH**



ON SUNDAY, NOVEMBER 7th



NOVEMBER 28 – DECEMBER 6

Floridians Face Skyrocketing Prescription Costs



Click on the link below for an informative article on what Floridians are facing regarding the prescription medication.

<https://states.aarp.org/florida/floridians-face-skyrocketing-prescription-costs-aarp-urges-advocates-to-get-involved>



Tune in to Walt of Priebe Investment Plans from 10am-10:30am every Wednesday on 1470AM, 95.3FM and 103.9FM dials and 8am-10am every Sunday on your 1230AM dial.

TRIVIA QUESTION

Did you know that there is a World Pumpkin Pie Eating contest every year? Who would you guess owns the title for 2021?



TRIVIA ANSWER

No other than Joey Chestnut. He ate 16 pounds of pumpkin pie in 8 minutes. He holds the title for eating the most of several things: hot dogs, eggs, asparagus, glazed donuts, pulled pork sandwiches, Taco Bell Tacos, chicken wings and the list goes on and on. I guess he has a big appetite!

CLIENT CELEBRATIONS

Client Birthdays

David Barnes
Brian Battle
Randi Battle
Margrit Billeter
Joan Ball-Curran
Don Bilder
Randall Clyde
Rose Culen
Patrick DeGasperis
Estelle Dorn
Julie Farbarik
Arthur Forte
Dan Falvey
Ron Giddens
Rich Hostler
Leticia Johnson
Eddie Kaye
Bryan Lara
John Merchant
Anna Mejia
Ray Schlichte III
Thomas Sharrow
Rob Seltzer



Martha Van Hook

Jack Wright

Karen Wells

Lorena White

Wedding Anniversaries

Jose Lara & Sonia Rodriguez

Tom & Joan McGoldrick

Bruno & Carol Zupp



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Rosie's

RECIPE CORNER



Chorizo & Cornbread Stuffing

1 pound fresh Mexican Chorizo
1 medium white onion, finely chopped
1 medium carrot, finely chopped
1 celery stalk, finely chopped
3 garlic cloves, finely chopped
2 cups coarsely crumbled cornbread or about 1/2" cubes
1/4 cup chopped fresh cilantro, plus more for garnish
1/2 cup chicken stock, low sodium
1 tbsp. unsalted butter
Grated cotija cheese, for garnish

1 Preheat oven to 350 degrees.

2 Heat a large skillet over medium heat and cook the chorizo, breaking it up with a spoon and stirring occasionally as it cooks, until it begins to brown, about 5 minutes. Add the onion, carrot, celery and garlic to the chorizo and cook, stirring occasionally, until the vegetables have browned, about 10 minutes. Add the crumbled cornbread and cilantro and gradually pour in enough of the stock so the stuffing is not too dry but at the same time not too wet. Stir gently and well.

3 Butter a small casserole dish. Spread the stuffing in an even layer. Bake until it's heated through and lightly browned on top, about 20 minutes. Serve right away, garnished with the cilantro and cotija, if desired. Enjoy!