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McKinley Carter
MASTER YOUR WEALTH.



CURRENTS

**Helping readers navigate the swirling forces
impacting their financial future.**

JUNE 2023

Hi,

Welcome to the 2Q2023 edition of *Currents*! In this issue, we have selected both interesting blogs and an insightful video to share with you, all of which were produced by members of our advisory team. We're confident you'll find much value in this content in your pursuit of "financial freedom."

As always, we encourage you to check out our entire blog library, called [INSIGHTS](#), where you can search for a specific topic of interest, or even search for more stories written by your favorite MCWS author. To check out additional videos and other McKinley Carter resources, just click [HERE](#).

Of course, if you have any questions or concerns that I can help you with, or if you're wondering if you're on track to a successful retirement, please don't hesitate to contact me. I'm happy to help in any way I can.

Happy Summer!

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Attention Skeptics: Unclaimed Property Notices May Be Worth Looking Into

By [Carmen Petote, CFP®](#)

Financial Strategist / [Risk Management Specialized Practice Group](#) Member

We've all heard the statement that If it's too good to be true, it probably is. Unfortunately, we've become so conditioned to ignoring items that fall into this "free found money" category that we cross the line from skeptical to cynical. Skepticism is healthy, cynicism is not. Even the statement itself contains the word "probably."



What I'm referring to here is the unclaimed property accounts all states have. You may have seen articles or ads telling you there might be money in your name, and all you must do is fill out a form to get it. It definitely sounds like one of those too good to be true proclamations. However, in this case it isn't. Here's why it may be worth your while to look into it.

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Finding the Right Insurance Agent

By [Kameron Smith, CFP®](#)

Financial Strategist / [Risk Management Specialized Practice Group](#) Member

Protecting your home and auto assets is an important piece to your LifePlan. But finding the right Homeowners and Auto insurance can seem overwhelming. Do you just go with what's easiest and choose someone you know? One way people navigate this complexity is by talking with an independent insurance agent. Independent agents are licensed to sell insurance products from multiple companies instead of being direct employees of just one company.



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Negotiation Skills: The Key to Unlocking Better Salaries, Contracts, Prices

By [Chris Buck, CFP®, CeFT®](#)

Financial Strategist / [Financial Autonomy Specialized Practice Group](#) Member

Negotiation skills are essential in many aspects of life, from job interviews and salary negotiations to purchasing a car or negotiating contracts with vendors. By learning how to negotiate effectively, you can increase your income and savings, as well as improve your overall confidence and communication skills.



[Read more](#)

New Video! SECURE 2.0 Act

Financial Strategist [Joel Estes, CFP®, CPFA®, NOPA™](#), offers an insightful

overview of the SECURE (Setting Every Community Up for Retirement Enhancement) 2.0 Act retirement legislation that went into effect in December 2022. Joel focuses on four key changes provided in the federal legislation that may benefit you.



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