

McKinley Carter
MASTER YOUR WEALTH.



MARCH 2024

Hello!

Welcome to the 1Q2024 edition of Currents! In this issue, we have selected interesting blogs 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 our educational videos, webinar recordings, 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!

Happy Spring,

McKinley Carter

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How to Freeze Your Credit, Benefits of Doing So

By [Rich Oliver](#)

Administrative Coordinator

[Risk Management Specialized Practice Group](#) Member

Protecting your personal information is more important now than ever before. With the increasing number of data breaches and identity theft cases, it's crucial to take proactive steps to safeguard your credit. One effective way to do this is by freezing your credit. Let's dive deeper into what credit freezing is, how to freeze your credit, and the benefits of taking this precautionary measure.



[Read more](#)

Have Company Stock in Your 401(K)? Save Big on Taxes

By [Joel Estes, CFP®, CPFA®, NQPA™](#)

Financial Strategist

[Tax & Legacy Specialized Practice Group](#) Member

As you work through the labyrinth of decisions that move you from working and planning and working some more, to drawing an income and conserving value, it is always a welcome discovery to reduce your tax bill and, therefore, add another layer of security to your personal financial outlook.



One of the lesser-known strategies some retirees should consider applies if they have company stock within their 401(k) or Profit Sharing Plan; the special tax election is known by the label *Net Unrealized Appreciation (NUA)*. Learn more.

[Read more](#)

3 Common Fraud Schemes Against Seniors

By [Joe Spangler](#)

Administrative Coordinator

[Risk Management Specialized Practice Group](#) Member

Protecting ourselves and seniors from fraud schemes requires awareness, education, and vigilance. By understanding the common schemes used against seniors, we can empower them to recognize scams and avoid becoming victims. Learn about the three most common fraud schemes against seniors and how to avoid them.



[Read more](#)

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