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Don't Miss the Deadline: Gifting, RMDs & Other Year-End Moves to Consider

An educational seminar with
Greg Holmgren, CFP, CLU, ChFC, CAP

INDUSTRY EXPERT WITH OVER 40 YEARS OF EXPERIENCE



Now Streaming: Greg Holmgren's Year-End Retirement Planning Seminar

Missed the live event? No worries.

The powerful retirement seminar— ***Don't Miss the Deadline: Gifting, RMDs & Other Year-End Moves to Consider***—is now available on-demand for a limited time.

Part of New York Life's Power of Knowing educational series, this eye-opening session gives you practical guidance to help you make informed decisions about your retirement planning.

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Featuring: **Greg Holmgren, CFP, CLU, ChFC, CAP**

Greg will walk you through key year-end financial decisions, including the short- and long-term impact of upcoming tax changes. He'll also cover one of the biggest tax choices people face—when to take distributions from retirement plans—comparing waiting until Required Minimum Distributions (RMDs) versus taking them earlier. You'll get practical tips to help you make confident decisions as you close out the year and plan ahead.

See these resources to learn more about these important topics:

- [Avoid these mistakes when tapping into your retirement savings](#)
- [How income annuities can help in retirement](#)
- [Is life insurance taxable?](#)

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