

GOOD LIFE NEWSLETTER

GOOD LIFE TRACKER

Q1

Q2

Q3

Q4

Feeling unsure about the markets? March is a great time to check in and ensure your investments align with your goals. Let's review your progress and make any needed adjustments —[schedule a meeting today!](#)



MARGIE'S MOTIVATION

"The positive thinker sees the invisible, feels the intangible, and achieves the impossible."

- Winston Churchill

WHAT'S NEW ON YOUTUBE ANTHONY'S THURSDAY THOUGHTS

[Power Points: How to Satisfy Your RMD Without Paying Taxes](#)

[Power Points: Don't Wait Until the Last Minute for Your RMD!](#)

[Watch More!](#)

Check out Anthony's article of the month: *Job loss can be overwhelming, but knowing your options helps. This article highlights key steps for federal employees facing layoffs. If you or someone you know is affected, we're here to help—reach out with any questions: [Are you a fired federal employee? Here are resources to help you get back on your feet.](#)*



AMY'S ADVENTURES

Hi there! I'm thrilled to welcome you to the newest addition of the Stein Financial Group newsletter. As a traveler at heart, I often find myself exploring new places around the world, immersing myself in different cultures through food, history and experiences. But here's something I've realized: there's a whole world of adventure waiting for me right here in the Twin Cities, and I've been missing out on so

much of it. So come along with me on my adventures, as I expand my horizons and explore our local history, food, beauty and culture.

One of my favorite ways to spend time is by visiting museums, especially during the "in-between" season. You know, that time when winter activities are winding down, but summer fun is still a little ways off? It's the perfect opportunity to appreciate all the amazing local exhibits we have. Last week, I had the chance to visit the American Swedish Institute during their free Thursday night hours. I'd never been before, and wow, I'm so glad I went. The current exhibit by Ann Wolff is absolutely stunning and will be open through June 8, 2025—definitely a must-see!

If you're looking for some more museum adventures, here are a few other places around the Twin Cities that offer free admission times—perfect for when you want to explore something new without breaking the bank.

- **American Swedish Institute** – Located in South Minneapolis, admission is free every Thursday from 3-8pm.
- **Weisman Art Museum** – Located on the University of Minnesota (Minneapolis) campus, admission is always free.
- **Bell Museum** - Located on the University of Minnesota (St. Paul) campus, admission is free on Sundays.
- **Walker Art Center** – Located just outside of downtown Minneapolis in the Lowry Hill neighborhood, admission is free every Thursday from 5-9pm and on the first Saturday of the month. Don't forget, the sculpture garden outside is always free, and is a wonderful place to visit on these warm spring days.

CHARITY SPOTLIGHT

Quatrefoil Library

Quatrefoil Library is a unique, volunteer-run LGBTQ+ library located in Minneapolis. It provides a welcoming space for the community to explore literature, history, and resources related to LGBTQ+ topics, fostering learning, connection, and pride.



JEFF'S LIFE LESSON:

The Importance of Being Prepared



Preparation isn't just about harsh winters—it's about life. From securing important documents to protecting against scams, small steps today can prevent big headaches tomorrow. Jeff's new blog dives into practical ways to safeguard your finances, identity, and future in an uncertain world.

[Read Here](#)

ERIN'S EVENT COLUMN



The Four Phases of Retirement Taxes: Plan Smarter, Save More

MAR 27 12pm

[Register](#)

Coffee Chat at Rustica

MAR 31 10-11am

[More info here!](#)

Let's Connect!



steinfinancialgroup.com

1600 Utica Ave. S, 9th Floor, St. Louis Park, MN 55416

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