

Notes From Elm Grove

March, 2017

Don't miss out on our future Newsletters or Notes!

Liberty Financial Group, Inc. is changing the way we send out the news.

Up until now, each digital issue of our quarterly newsletter, **The Strategist**, and our **Notes from Elm Grove** has been sent out in a giant email "blast" from June Schroeder.

Because of media and technology upgrades we have made, from now on these communications will come from: **Tom Wargin <info@lfgwi.com>***. **The subject will be "LFG Newsletter" or "Notes From Elm Grove."** *Be sure to add this email address to your contact list so you don't miss out on future issues.* (*Note: this is a generic address, and not Tom's direct contact.)

On **Wednesday, April 19th**, we will be sending out a test letter from **Tom Wargin <info@lfgwi.com>** to confirm we have your correct email address and that you are receiving the communications to your inbox. On that date, if you don't think you have received our communication, do the following:

- Check your Spam or Junk folder to see if it went there. If it did, make sure to mark it as "Not Junk or Spam" and add **Tom Wargin <info@lfgwi.com>** to your contact list. This will ensure it goes to your inbox.
- If you still don't see anything, please call us at 262-785-1377.

June will continue writing many of the communications. She has always enjoyed receiving responses and comments about the articles, and would still like to hear from you. In each issue, we will publish her email address: june@lfgwi.com so you can send her a comment or greeting.

Contributed by Heidi Engel

What Tax Stuff Should I Save?

Every year at tax time we get the question above. The answer is more complex than we would like it to be so we searched out an article that has a good, detailed explanation of the things that are important and not so important to save for various periods of time. The link below will take you to an article on our website with the answer to that question:

[Which Tax Records Can You Throw Out?](#)



Where's My Refund?

Here's the link to the federal site: <https://sa.www4.irs.gov/irfof/lang/en/irfofgetstatus.jsp>
and the one for Wisconsin: <https://ww2.revenue.wi.gov/RefundInquiry/request.html>

Did You Know:

The good news = U.S. Dementia rates are falling? According to a study published in the New England Journal of Medicine, incidences of dementia in people age 60 and older have fallen steadily from the late 1970's to the early 2000's.

The bad news = Caregiver dementia is real! Unlike a degenerative brain condition, this problem stems from stress and lack of sleep. Most recover from it once their caregiving duties end, but not all do. The Journal of the American Geriatric Society published a study which found that people who cared for spouses with dementia were less likely to recover unless they find ways to improve coping skills.

The new news = Financial planning industry leaders have recognized the need for financial professionals to be aware of and be prepared for the possibility of a client's changing mental acuity. In fact, a few clients have asked about this issue. We will be addressing more of this topic in the future with some guidelines and suggestions for us and for you.

More news = Researchers are looking into the connection between increased social media use and the decline in dementia in older adults, especially since 2010. It seems that Pew Research has found that social-media usage, including Facebook and Twitter has tripled in the over 65 crowd since 2010, thereby fostering more social connection and involvement.



A Centennial To Commemorate

April is just around the corner and with it comes the 100th anniversary of the end of the Great War, WWI. For those looking for travel destination this summer, consider the National World War I Museum and Memorial in Kansas City. The history of the museum itself is an interesting tale, notwithstanding the amazing artifacts, re-creations and interactive displays for all ages. This year there are also representations from around the world, including drawings and essays on loan from Paris done by French school children as the U.S. Troops landed in France in 1917.

Spring is the time when we come out of our winter shells and do our part in making sure that there will be plenty of attractions for the birds, butterflies and bees, some of which are in trouble, for example bumblebees and Monarch butterflies. It's time to for me to prepare to fight/pull/control those pesky invasive plants, like garlic mustard and Dame's Rocket.

It's also time for the annual West Bend Children's Theater play. I am a board member and a performer. This year's production is James and the Giant Peach. LFG is a regular sponsor of the WBCT. Dates are April 19 – 21 afternoon and evenings. If you are interested in checking us out, call LFG. We have limited number of complimentary tickets for evenings on 4/20 or 4/21.