



The Rosenberg Group

Private Wealth Management

BAIRD

September 2017 Newsletter



Equifax Data Breach

Security Steps to Protect Your Personal Online Information

1. Credit monitoring service
2. Fraud alert
3. Credit freeze
4. Annual credit report

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11 Basic Estate Planning Mistakes

Avoiding these common slip-ups could make a big difference for the people you care about

1. Doing nothing
2. Vague objectives
3. Incomplete planning
4. Inadequate documentation
5. Naming the wrong fiduciaries

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Tackling the Long-Term Care Conversation

What You Should Know

- Many people will need long-term care at some point in their lives or be called upon to provide it for a loved one
- The cost of long-term care is expected to soar
- The fiscal and personal demands of long-term care can have a significant impact on your retirement plans

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The Friendship Circle 2017 Walk4Friendship

It was an honor to present The Friendship Circle's first ever Exceptional Friendship Award at this year's Walk4Friendship on Sunday, September 3. Over 4,000 people attended to raise awareness for this amazing cause and more than \$550,000 was raised! Congrats to the Pearlman Family for being the top fundraisers!

About the Friendship Circle

Friendship Circle is a non-profit organization that creates friendship in the lives of individuals with special needs and those facing isolation while providing an opportunity to become a contributing member of the community. Through its programming, Friendship Circle aims to promote an inclusive community that values all individuals regardless of the challenges they face.

[Visit The Friendship Circle Website](#)

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