


## Monthly Media Tip Sheet

Beat	Story	Source
Personal Finance	<b>How to Set Yourself Up for Financial Success in the New Year:</b> Millions of people are eyeing a fresh financial start as the new year nears, with paying off debt among the top goals. How can you identify the right plan, free up your budget and find creative ways to save more money?	A source from <b>Take Charge America</b> can provide tips for setting yourself up for financial success in the year.
	<b>Maximizing Charitable Giving Through Donor-Advised Funds:</b> As Arizonans tie up loose ends ahead of the 2024 tax season, maximizing charitable contributions should be top of mind. For individuals and families with significant contributions, a donor-advised fund may make sense. But what is a DAF exactly? Who are they designed for, and what are the benefits and drawbacks – for both the donor and the charity?	A representative from <b>BMO Wealth Management</b> can discuss the unique attributes of donor-advised funds and the advantages this account type offers as well as other key considerations for individuals looking to maximize Arizona charitable giving tax credits.
Accounting/Biz Finance	<b>'Winter Cleaning' for Businesses:</b> As 2023 comes to a close, December marks a critical season for Arizona business leaders looking to set their enterprises up for a strong start to 2024. Though tedious, a "winter cleaning" audit is essential to not just prepare for the incoming tax season but also ensure all other aspects of a company are properly documented -- from strategy around benefits, compensation structure and tax status changes to verifying vendors, subscriptions and new reporting requirements.	Elizabeth Hale, founder of Scottsdale-based <b>eeCPA</b> , can share insights on what Arizona business owners should prioritize for their end-of-year auditing process and new regulatory changes to look out for in 2024 as well as provide strategies for optimizing cash flow and lowering tax liability.
Legal	<b>Navigating Partnership and Joint Venture Disputes:</b> The start of the year is a popular time for new business ventures. Many people make New Year's resolutions, which can include starting a new business or pursuing entrepreneurial goals. But what happens when entrepreneurs pursue joint ventures and partnerships, but are having difficulties aligning on the overall business plan and visions?	A partner at <b>Guidant Law</b> can speak on key things to know about navigating partnership and joint ventures and how to set out rules and boundaries to prevent disputes.

Risk Management	<b>Risk Management for Cybersecurity Threats and Data Breaches:</b> According to <a href="#">the latest data from IBM</a> , the global average cost of a data breach in 2023 was \$4.45 million, a 15% increase over 3 years. How can business owners keep employees and clients safe, safeguard financial information and ward off cybersecurity threats for the upcoming year?	A source from <b>MMA</b> , formerly Lovitt & Touché, can speak on these insights and discuss measures businesses can put in place to increase security of their digital assets, including incident response planning, employee training and threat detection/response tools.
Real Estate	<b>End-of-Year Real Estate Recap and a Peek into 2024:</b> It's been quite a tumultuous year – between the unpredictable terrain of interest rates and the rollercoaster that is the Phoenix market, it's been tough to navigate all the ins and outs. Want a clearer vision of what's to come in 2024?	Butch Leiber, President of <b>Phoenix REALTORS™</b> Board of Directors, can provide insights on where we've been and where the market is expected to go in the next year.
Healthcare	<b>Understanding Obstacles Leading to Autism Diagnosis Delays:</b> A <a href="#">new report on the state of autism care</a> reveals major barriers to diagnoses such as specialist shortages, lengthy evaluations, documentation burdens for providers and disparities in access due to limited reimbursement. Understanding that delays in diagnoses can be detrimental, Axis for Autism can shed light on the ins & outs of these barriers, why they exist, and provide solutions for those in need of faster, more accessible Autism evaluations and care.	An expert from <b>Axis for Autism</b> can lend insights into the major setbacks in autism diagnosis and why timely evaluations are so vital.
	<b>Steps to prevent heart disease – Arizona's leading cause of death:</b> Heart disease is the leading cause of death for both men and women statewide. However, the World Heart Federations estimates that 80% of cardiovascular disease, including heart disease and stroke, is preventable. As a new year and healthier mindsets set in, what can people do to reduce their risk? What lifestyle habits and treatments should they consider outside of the typical “eat right and exercise more” advice?	Cardiologist Dr. Todd Hurst from <b>HealthspanMD</b> in Phoenix can shed light on risks, treatments and technologies that can help prevent heart disease.

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