


October 2024 – Monthly Media Tip Sheet

Beat	Story	Source
Personal Finance	<p>Navigating Year-End Financial and Tax Planning to Maximize Wealth: With the final quarter of 2024 upon us, individuals and business owners alike should begin preparing their financial strategies to maximize tax efficiency. How can wealth management strategies, such as charitable giving, retirement account contributions and investment allocation, help reduce tax liabilities and strengthen long-term financial goals before year’s end?</p>	<p>A source from BMO Wealth Management can discuss how strategic year-end tax planning, such as charitable giving and maximizing retirement contributions, fits into broader wealth management goals.</p>
	<p>Struggling to Meet Financial Goals? Assess Your Financial Outlook Before a New Year Begins: With the end of the year approaching and the holiday season looming, fall offers a prime opportunity to take stock of your financial health. Whether planning your budget, building up an emergency fund or assessing debt payoff strategies, now is the time to ensure you are on track before the new year.</p>	<p>An expert source from Take Charge America can share the top tips to keep in mind as you assess your finances before 2025 rolls around.</p>
Insurance	<p>How Businesses Can Address Social Determinants of Health to Improve Well-Being in the Workplace: As organizations increasingly prioritize employee well-being, it’s crucial to consider the broader factors that impact health outcomes beyond the workplace. Social determinants of health — such as access to healthcare, financial stability and living conditions — play a significant role in employee productivity and overall well-being. How can companies better support their workforce by addressing these determinants and improving both health outcomes and organizational success?</p>	<p>A representative from Marsh McLennan Agency’s Scottsdale office can provide insights into how businesses can leverage insurance solutions and contingency planning to address social determinants of health as well as explain how these strategies protect against revenue loss and operational disruptions.</p>

Real Estate	<p>How an Interest Rate Reduction Will Impact the Homebuying Market: The U.S. Federal Reserve’s recent decision to cut interest rates by half a percentage point has left many prospective homebuyers wondering about the impact it may have on their purchasing plans. With the rate reduction now official, many are predicting a resurgence in demand as more buyers may be drawn back to the market, with renewed hope this could improve affordability and increase purchasing power.</p>	<p>Board President of Phoenix REALTORS® Sheryl Bowden can provide insight on the impact this decision will have on potential homebuyers and what they should know as they navigate purchasing a home with this change in rates.</p>
Legal	<p>Is EDR Right for All Cases? What Businesses Should Consider When Pursuing Early Dispute Resolution: When it comes to legal conflict, time is money. This is why early dispute resolution (EDR) provides a proactive approach to settle disputes before they get to the costly litigation stage. Not only does EDR minimize expenses like attorney fees and court costs, this method also reduces the stress of a lengthy litigation process.</p>	<p>Guidant Law Partner Gary Smith can provide valuable knowledge on early dispute resolution and how it can help resolve conflicts proactively while avoiding the stress of litigation.</p>

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