



Monthly Newsletter



**LINEWEAVER**  
*Wealth Advisors, LLC*

Experience you want, answers you need<sup>SM</sup>  
since 1993



*A note from the CEO*

Jim Lineweaver, CFP®, AIF®  
President, CEO and Founder

When I first started Lineweaver Wealth Advisors 30 years ago, I wanted to make it my business to listen carefully to you so that I could help provide accurate information specific to the needs you have today, as well as your future aspirations. Now as we enter our fourth decade of service, I'm happy to report that the team behind Lineweaver Wealth Advisors has been able to do just that in Northeast Ohio and beyond.

To continue that accomplishment, we want to provide you with timely information in a frequent manner right to your inbox. Going forward, we'll be moving away from our quarterly newsletter and will be offering a monthly newsletter containing information on current trends and topics.

We seek, through our communications, to offer insights that provide context on economic and financial market trends and focus attention on the most important elements of a complex, ever-changing financial landscape.

As always, if you have any questions or concerns, please reach out to the Lineweaver Team. We're here to help!

Sincerely,  
Jim Lineweaver, CFP® AIF®

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## Article

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### How to prepare to retire in a slowing economy

With a slumping stock market and a slowing economy, early retirees and people looking to retire in the near future need to make intelligent decisions to avoid jeopardizing a successful retirement.

Here are a few actions our trusted financial planners recommend to help make the transition into retirement as seamless as possible.



[Read More](#)

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Is market volatility taking a bite from your savings?  
Start saving for the future with a  
CD or Bond Ladder today!

12-MONTH CERTIFICATE OF DEPOSIT

**4.55%**<sup>1</sup>



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## Financial Quarterback

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### What your accountant should (or shouldn't) be doing

Your Financial Quarterback Jim Lineweaver, CFP®, AIF® and LFG Tax Director Mark Sipos discuss what your accountant should - or shouldn't - be doing as we enter into tax season.



Watch Now



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1. Rates based on market pricing as of December 29, 2022. Subject to change. Subject to availability at time of purchase. CD rates based on FDIC brokered CDs. Bond rates based on investment-grade corporate bonds. Average minimum deposit of \$5,000 per product. Fees will reduce account earnings. A penalty may be imposed for early withdrawal. Lineweaver Wealth Advisors may impose a minimum account balance for new and existing accounts.

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