



Monthly Newsletter



LINEWEAVER
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Article

A new IRS ruling could affect your children's inheritance

In a major shift, a new IRS ruling has tightened the regulations surrounding irrevocable trusts and the step-up basis. In the past, families have been utilizing irrevocable trusts to protect their assets from spend-down to still qualify for benefits like Medicaid and VA Aid.

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Financial Quarterback

Look back, look ahead halfway through the year

In this episode, your Financial Quarterback Jim Lineweaver, CFP®, AIF® and President of Wisdom Capital Jerry Herman, CFA® as they take a look back at the first half of the year and what to expect for the rest of the year.



[Watch Now](#)



STUMP THE QUARTERBACK

If you have questions about your finances - how you can help maximize your retirement, minimize your taxes, and everything in between, you can ask! Tune into The Financial Quarterback with Jim Lineweaver on Sundays at 9:57 a.m. on Fox to see if your question is highlighted in the episode.



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