



Monthly Newsletter



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Article

We've updated our disclosure documents

As part of our fiduciary duty to you, we are required to amend our disclosure documents whenever we have changes that might be considered material. As a result of our transition to a non-wrap fee portfolio management program that became effective last month, we have updated our Form ADV documents. Please find the following disclosure documents accessible via the corresponding hyperlinks:

- 1) [Client Relationship Summary - Form CRS](#)
- 2) [Form ADV Part 2A](#)

Please keep these disclosure documents for your records. As always, we appreciate your business and we're here if you have any questions.

Sincerely,
The Lineweaver Financial Team

Financial Quarterback

IRS Revenue Ruling on Irrevocable Trusts

In this episode, your Financial Quarterback Jim Lineweaver, CFP®, AIF® is joined by Laurie G. Steiner, CELA, OSBA, a partner in the law firm of Solomon, Steiner & Peck, Ltd, to discuss the recent IRS Revenue Ruling on Irrevocable Trusts.



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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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