Your Financial Journey. Our Expertise.

Happy New Year and here is to 2022!

Whether you are a client, business affiliate, or exploring Boston Wealth as your future financial partner, our goal is to have a newsletter that serves each of your needs.

Our newsletter will focus on providing timely economic and market trends, retirement planning strategies for business owners and their employees, and financial planning solutions for individuals and families.
In addition we will keep you updated on what's happening here at Boston Wealth Strategies with seminars and events, along with our community / volunteer efforts and how you can get involved.

Quarterly Market Update

Stay up to date on the economy and markets with perspectives from our CIO, Brad McMillan, and other members of Commonwealth's Investment Management and Research Team

Market Update - Quarter Ending 12/31/2021

Learn More

Retirement Planning

2022 IRS Plan Limits have been released and there are changes to note.

Click below to see the updates.
2022 IRS Benefit Limits

January is a critical time of year for businesses that offer 401(k) and other retirement benefits.

The best way to ensure you are on track to manage your regulatory deadlines is to use a compliance calendar.

Click below to save these important dates.
2022 Compliance Calendar

Learn More

Financial Planning

As a business owner, are you looking for additional resources to increase employee satisfaction and retention?

Offering corporate financial planning is a nice benefit for those hard working individuals you don't want to lose.

Click below to learn more about this new service that we provide.
empowerEd - Corporate Financial Planning

Click the link below to learn a few suggestions on how to turn a gift of money into a learning experience for your children.

Turning Monetary Gifts into Learning Experiences

Learn More

What's Happening at BWS?

Welcome Valerie!

BWS would like to welcome Valerie McClendon to our Corporate / 401(k) department. She joins us with 24 years of experience in the qualified plan space and will be working to enhance our retirement plan offerings. Look for more to come on Valerie!
Click here to email **Valerie and say hello!**

Congratulations Caroline!

Caroline Knights has been promoted to Director of Financial Planning Services at BWS. We are so proud of Caroline for the knowledge and experience she has gained over the last year. In her new role, Caroline will work on strengthening our planning department services and features, as well as training and mentoring new planning department team members.
Click here to say **Congrats to Caroline!**

Below is a list of our current 2022 events. Please mark your calendars and visit our website to sign up for any event you wish to attend (zoom and/or live).

We will continue to add events throughout the year so remember to keep checking back for new and exciting additions to our events calendar. **Visit Our Website!**

January 27th - BWS 2022 Economic, Market and Tax Outlook Webinar

March (Date TBD) - Family Love Letter Zoom Event

Back by popular demand is our LinkedIn strategic thought of the month video series (STOM).
Are you connected to our page and following us...

Here we share monthly ideas and thoughts, brought to you by different team members at BWS.

Topics range from thoughts on current events, strategies for your financial independence and of course personal stories that our wonderful team is willing to share.

Shredding Party (April or May TBD) - bring all your old documents to our office for an onsite shredding service and stay for a quick bite.

Make sure you are connected to our page and following us to watch these quick videos.
Visit Our LinkedIn Page!

Contact Us

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