

Welcome to Forefield® Advisor, CPA Planner

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  - Roth Conversion
  - Retirement
  - Estate Planning

**Advisor Content**

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**Presentation Center**

Concept Pieces, Presentations, Business Builders, Case Studies, and Calculator Presentations

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**Alerts**  

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-  [Open Enrollment Begins October 1 for Health Exchanges - September 19, 2013](#)
-  [ACA Employee Notice - September 17, 2013](#)

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**Video Client Alerts**



**Rising Interest Rates and Your Portfolio**

July 25, 2013



**Long Term Capital Gain: What Tax Rate Applies?**

May 23, 2013

[More Video Client Alerts...](#)

## Financial Goals

Click on one of the financial goals below to display financial planning topics relevant to that goal. All Forefield Advisor resources are indexed under at least one Financial Goal. To perform a free-text search across all Financial Goals, go to [Search](#).

-  [Personal Finance](#)
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Client:



















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## Life Events

Life events often trigger a client's need for financial planning advice across multiple Financial Goals. Click on a life event below to display selected checklists, articles, and decision tools. To search all Forefield Advisor resources go to [Search](#) or browse all resources by going through [Financial Goals](#).

-  [Starting Out](#)
-  [Changing Jobs](#)
-  [Coping with Unemployment](#)
-  [Getting Married](#)
-  [Starting a Family](#)
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-  [Saving for College](#)
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## My Clients

[My Clients Tutorial](#)  
[Set and Forget Tutorial](#)

Manage your clients and prospects by adding, grouping, and modifying the contact list below.

[Add a Client](#)  
[Import Contacts](#)

Filter Results By:

Status:  
 Distribution Preference:  
 Groups:

3 of 3 contact(s) shown

<input type="checkbox"/>	Account Name ▼	First	Last	Email	Hard Bounces <sup>1</sup>	Soft Bounces <sup>2</sup>
<input type="checkbox"/>	<a href="#">Albert Jones</a>	Albert	Jones	ajones@sample.com	0	0
<input type="checkbox"/>	<a href="#">Brad Keith</a>	Brad	Keith	bkeith@sample.com	0	0
<input type="checkbox"/>	<a href="#">Optional Client Name can be inserted here</a>	Tom	Smith	tsmith@sample.com	0	0

Records to Display:  ▼

Quick Updates:

Select checkboxes from the client contact table and use the choices below to update numerous records at once.

Select:      
 Distribution Preference:   
 Groups:

## Video Client Alerts

FINRA Letters

Video Client Alerts contain timely information in video form.

## Concept Videos

FINRA Letters

Concept Videos contain timeless information in video form.



**Rising Interest Rates and Your Portfolio** - July 25, 2013

- Video preview
- Video e-mail



**Strategies for Coping with Market Volatility**

- Video preview
- Video e-mail



**Long Term Capital Gain: What Tax Rate Applies?** - May 23, 2013

- Video preview
- Video e-mail



**Financial Planning: Helping You See the Big Picture**

- Video preview
- Video e-mail



**The American Taxpayer Relief Act of 2012** - January 15, 2013

- Video preview
- Video e-mail



**Three Factors to Consider When Investing for Retirement**

- Video preview
- Video e-mail



**The Fiscal Cliff: What Does It Mean?** - November 02, 2012

- Video preview
- Video e-mail



**Four Money Mistakes You Might Be Making**

- Video preview
- Video e-mail



**New Medicare Contribution Tax Applies to Unearned Income of High-Income Individuals in 2013** - June 05, 2012

- Video preview
- Video e-mail



**Why Participate in Your Employer's Retirement Savings Plan?**

- Video preview
- Video e-mail



**Additional Medicare Payroll Tax: High Income Individuals Face New Medicare Taxes in 2013** - May 29, 2012

- Video preview
- Video e-mail



**Six Reasons to Work with a Financial Professional**

- Video preview
- Video e-mail



**Death and Taxes: An Update -Video Client Alert** - March 09, 2012

- Video preview
- Video e-mail



**Health Care Reform: A Timeline of Benefits and Provisions**

- Video preview
- Video e-mail



**Federal Income Tax Landscape 2012 & 2013** - December 30, 2011

- Video preview
- Video e-mail



**Health Care Reform: Changes to Medicare**

- Video preview
- Video e-mail



**Putting Market Volatility in Perspective: Coping with Volatility** - August 23, 2011

- Video preview
- Video e-mail



**Social Security: When Should You Start Receiving Retirement Benefits?**

- Video preview
- Video e-mail