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## On Course | March 30, 2021 | Volume 21, #3

Welcome. We at Compass Planning appreciate the understanding and support from all of you as we move through this pandemic. Thank you.

This month we're sharing websites that we use and recommend to our clients.

You may have missed our series on retirement. For Retirement, Part 1 - Retirement Savings, click [here](#). For Retirement, Part 2 - Social Security, click [here](#). For Retirement, Part 3 - The Retirement Paycheck, click [here](#).

If you need assistance adding to or expanding your technology resources, we are here to help you stay *On Course!*

Jennifer Lane, CFP



Any technology you use is only as good as your efforts to set it up and maintain it. Don't work without some form of backup and alternate way to access your account information. Still, the ease of using online systems makes creating a computer-based plan and sharing it with family members much more efficient than having a paper-based system.

## Web Resources

A never-ending list of financial and personal websites can confuse even the professionals. Following is a curated list of web resources

that we use and recommend. Try them out to assist in your financial life.

#### Favorite websites we use every day

- [www.morningstar.com](http://www.morningstar.com) -- investment research and info
- [CalcXML.com](http://CalcXML.com) -- quick and easy back-of-the-envelope calculators with no advertising
- [www.IRS.gov](http://www.IRS.gov) -- best place to get tax rule info, including retirement plan contribution limits and tax brackets

#### Stay on top of your financial plan

- [www.MoneyGuidePro.com](http://www.MoneyGuidePro.com) -- if you want to review your plan or change assumptions between meetings, ask us for your SmartPortal log-in so we can give you access to your plan directly
- [www.MINT.com](http://www.MINT.com) -- one of the better financial account aggregators for managing all your money and investments in one place.
- [www.SSA.gov](http://www.SSA.gov) -- Social Security has done an excellent job on their website. Easy to search and find answers.

#### Make managing your finances online safer

- Web security -- [McAfee](#), [Norton](#), and [Microsoft Defender](#)
- Password managers -- [Dashlane](#), [LastPass](#), and [1Password](#)
- Virus protection - [Malwarebytes](#)

#### For the kids

- [Greenlight](#) -- debit card for kids, managed by parents
- [GoHenry](#) -- for ages 6-18, pay an allowance, managed by parents

#### College planning

- [SavingForCollege.com](http://SavingForCollege.com) -- a guide to 529 plans
- [StudentAid.gov](http://StudentAid.gov) -- an excellent website on federal student aid

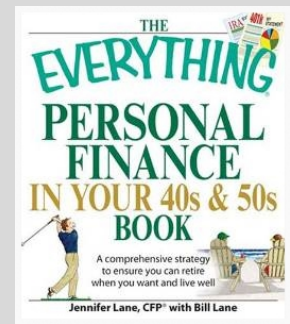
#### Learn more about investing and finances

- [www.investopedia.com](http://www.investopedia.com)
- [Your Money - The New York Times \(nytimes.com\)](http://YourMoney-TheNewYorkTimes.nytimes.com)

#### Help with estate planning

- [www.Everplans.com](http://www.Everplans.com) -- contact us for a free subscription
- [Cake.com](http://Cake.com) -- end-of-life planning

Get more tips in Jennifer's book



Buy Now

Jennifer and Sarah were both named  
2021 Boston Five Star Wealth  
Managers.



#### Helpful Websites

[CalcXML.com](http://CalcXML.com)  
[IRS.gov](http://IRS.gov)  
[Morningstar](http://Morningstar)

## Jennifer In The Media

Below are links to Jennifer's frequent contributions to financial planning articles.

- **NEW!!** NBC10 consumer investigative reporter Leslie Gaydos interviewed Jennifer for savings tips. For a great video, *How to Save \$1,000 in 5 Months*, click [here](#). For the written article, click [here](#).
- Jennifer contributed to a timely article, *How to seek forbearance on your mortgage*, for The Boston Globe. [Read article.](#)
- If you're interested in dividend funds, Jennifer contributed to The New York Times article, *Dividend Funds Can Add Income, and Risk, to Your Portfolio*. [Read article.](#)
- Jennifer contributed to a BankRate article, *Should I combine my mortgage and student loans?* [Read article.](#)

- Need help with your 401(k) during the pandemic? Jennifer contributed to a **Boston Globe** article, *Five tips for managing a 401(k) during the pandemic's turbulence*. [Read article.](#)
- Jennifer contributed to the **Bottom Line Inc** article *Prepare your Finances for a Possible Recession*. [Read article.](#)
- Jennifer contributed to **The Wall Street Journal** article *If Saving During a Pandemic Is Hard, Here's How to Stay Motivated*. [Read article.](#)
- The **New York Times** featured Jennifer in an article titled, *Balanced Funds Don't Inspire Fear or Greed. That's Why They Are So Useful*. [Read article.](#)
- With a contrarian view, Jennifer contributed to an article, *People are enraged by the idea that you should have twice your salary saved by the time you're 35!* published recently by **Business Insider**. [Read article.](#)
- Moving in together? Check this article from **Business Insider**, *Five questions you and your partner should answer before taking the biggest step in your relationship*. [Read article.](#)
- **Insider** asked Jennifer to contribute to an article on old fashioned ways to manage your money, *Six money-saving tips your grandma used that are way more effective than any budgeting app*. [Read article.](#)
- Jennifer contributed to an article on **Business Insider**, *This is the best way to do your taxes online - according to experts*. [Read article.](#)
- **CNN Money's** Money Moves featured Jennifer in an article on how to strike the right balance between retiring early and saving enough. [Read article.](#)
- Jennifer contributed to a **CNN Money** article *When is the Right Time to See a Financial Advisor?* [Read article.](#)

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## Compass Planning News

- Compass Planning continues to meet with clients as well as those interested in learning more about the firm via phone and web-based video conferencing. Email [info@compassplanning.com](mailto:info@compassplanning.com) to learn more.
- Compass Planning has become a supporter of [The Center for Financial Planning](#) at the sustainer level. The CFP Board created the center to achieve a more diverse and sustainable financial planning profession so that every American has access to competent and ethical financial planning advice.
- Compass Planning is a sponsor for this year's YW Boston's [2020 Elevating Lives Series](#). YW Boston's Elevating Lives Series is a curated event series that focuses on areas relating to the YW Boston's mission of eliminating racism and empowering women. The series convenes thought leaders from across sectors for transformative discussions that help elevate lives.
- AdvisoryHQ named [Compass Planning](#) as one of the ten best Boston financial advisors. ([Disclosures](#))

*Compass Planning Associates helps families, individuals, and small-business clients achieve financial security, knowledge, and control over their money. Our fee-only, client-centered approach provides education and guidance for achieving financial goals and dreams.*

*This newsletter and any linked references are for informational purposes only and are not to be construed as tax, legal, or investment advice. Compass Planning has gathered the information from sources it believes are reliable, but your individual situation can vary, and you should consult with your investment, accounting, and/or tax professional before taking any action.*

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