



The world may change.
The way we care *never will.*

TAX TIME

The tax deadline has been extended to **May 17th**. Consult with your tax adviser on the following commonly known tax benefits:

7 Overlooked Deductions or credits

- State-tax refunds for AMT taxpayers
- Charitable donations
- Health-Insurance premiums for the self-employed
- Medical Expenses
- Sales-tax deduction in lieu of income taxes
- Moving Expenses
- Domestic Production Deduction

6 Common Errors

- Overstating charitable deductions
- Deducting mortgage “points” incorrectly
- Overlooking the “kiddie” tax
- Missing the Making Work Pay credit
- Omitting small interest payments
- Roth Conversions and filing extensions

5 Tips for Investors

- Wash Sales – Taxpayers can’t take long-term capital losses on stock sales if they also buy shares 30 days before or after the sale.
- Dividends – Only “qualified” dividends get a top tax rate of 15%; others are taxed at ordinary income tax rates.
- Losses - Long-term capital losses can be used to shelter an equal amount of long-term or sometimes short-term gains.
- Employee stock – Be careful with shares that originated as stock, options, restricted stock, or employee stock.
- Incentive stock options – The tax treatment of these options can be advantageous but also is tricky. Expert help is a good idea because there are alternative-minimum-tax consequences both on exercise and sale.

Priebe Investment
Plans invites you to a



Live via
ZOOM!!

On Tuesday,
April 27th
12 noon

We invite you to join us in our Fort Lauderdale office for an educational presentation.

Topic:

Tax Strategies: What Biden is Up To

Join us for a friendly discussion. **Bring your spouse, neighbor or friend.** Walter Priebe will have a short presentation and will be available to take any questions. Seating is limited. Lunch will be served.

Please call our office, 954.974.3266 to reserve your seat or to get a link to the LIVE zoom meeting.

Office Address:
2933 W. Cypress Creek Rd.
Suite 102
Fort Lauderdale, FL 33309



Referrals! Referrals! Referrals!

We love referrals!! Please tell your family, friends, or neighbor that Walter Priebe will buy them lunch for an opportunity to introduce himself and offer his services and expertise. Two dates are being offered this month. We invite you and a friend or neighbor to come on by for a

quick introduction, order lunch to go and allow him the opportunity for a no-cost, no-obligation first appointment at a later date at your convenience. Please call to book your next lunch with Walt!

Thursday, April 1st
Shooter's Waterfront
3033 NE 32nd Avenue
Fort Lauderdale, FL
12pm-2pm **LUNCH**

Thursday, April 15th
Texas Road House
3001 Old Boynton Road
Boynton Beach, FL
4pm – 6pm **DINNER**

In your 40's?

If so, have you started a retirement plan? How full or empty is your basket? Or do you have scrambled eggs in your basket? In other words, have you left retirement money with old employer sponsored programs in several different areas?

It's never too late to start. However, you do *need to start*. Now is the time to shift priorities and work on your retirement. Give us a call to go over all of your options.

10 Brain Exercises That Boost Memory



We don't just lose muscle over time – our brains can atrophy, too. More specifically, your brain's cognitive reserve – its ability to withstand neurological damage due to aging and other factors without showing visible signs of slowing or memory loss – diminishes through the years. That can make it more difficult to perform mental tasks. But just as weight workouts add lean muscle to your body and help you retain more muscle in your later years, researchers now believe that following a brain-healthy lifestyle and performing regular, targeted brain exercises can also increase your brain's cognitive reserve. For the 10 Brain exercises, click on:

<https://www.everydayhealth.com/longevity/mental-fitness/brain-exercises-for-memory.aspx>



Tune in to Walt of Priebe Investment Plans from 10am-10:30am every Wednesday on 1470AM, 95.3FM and 103.9FM dials and 8am-10am every Sunday on your 1230AM dial.

TRIVIA QUESTION

April is filled with yummy National Food Days. Grilled cheese is one of them, on April 12th. Where is the National Grilled Cheese Competition held and what is the top prize?

Happy EASTER from:



CLIENT CELEBRATIONS

Client Birthdays

Robert Blandford
Reina Burnett
Craig Bunce
Diego Batista
Mary Lynn Cotter
Rob Christie
Bill Collins
Patricia Clyde
Kathy DiStefano
Maynard Day
Frank Galano
Cyndi Hughes
Joe Hardie
Marilu McDonough
Janice McHugh
Alan Murray
Richard Massimillo
Debbie Priebe
Martin Shorkey
Diane Sapol
Michele Scipione
Marc Viens



Wedding Anniversaries

Jeremy & Salina Baker
Walter & Mary Lynn Cotter
Kraig & Denise Kessel
Eddie & Marsha Kaye
Sam & Ethel Lagravinese
Ron & Janice McHugh



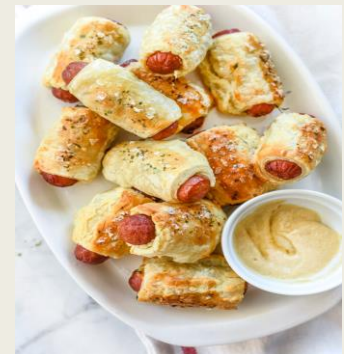
TRIVIA ANSWER

As you may have guessed, Wisconsin is the home to the Annual Grilled Cheese competition where hundreds compete for the top prize of \$15,000 and bragging rights!

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Rosie's

RECIPE CORNER



Pigs In a Blanket with a Twist

Celebrating Pigs in a blanket day on April 24th!

These are a true crowd pleaser!

Ingredients:

1 lb. pkg. frozen puff pastry sheets
Flour for dusting
1 egg beaten
8 uncooked jumbo all-beef hot dogs
2 tbsp. grainy mustard
Small handful of chopped fresh herbs, such as thyme, marjoram or rosemary
Kosher salt

Instructions:

Preheat oven to 400 degrees F.

Defrost puff pastry according to package instructions. Roll the pastry out on a floured counter to a rectangle of about 19"X12". Cut the large rectangle in half lengthwise, then cut both smaller rectangles into eight equal sections down to 16 rectangles total.

Spread a small amount of mustard on top 1/3 of each pastry rectangle. Lay a half of a hot dog on the mustard and sprinkle with herb of choice. Brush the other end of the rectangle with a little of the beaten egg and roll the hot dog in the pastry, sealing the ends. Put the rolls in the refrigerator for 15-20 minutes for the pastry to chill. Remove from the fridge and prick the tops with a fork, brush with the rest of the beaten egg, sprinkle with Kosher salt and bake in the oven for 25-30 minutes, or until the pastry is golden brown. Serve with mustard on the side. Enjoy!