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If you were hit by a bus today or were otherwise incapacitated, would your loved ones be able to quickly locate your important information or know how to handle your affairs? Did Whitney Houston or Davy Jones prepare for the unexpected? Many of us have a great handle on our finances, but our record keeping systems might not be obvious to family members or friends who might need immediate access to them in time of emergency. Below are 25 documents to leave behind for loved ones:

1. Will
2. Letter of instruction
3. Trust documents
4. Housing, land, and cemetery deeds
5. Escrow mortgage accounts
6. Proof of loans made and debts owed
7. Vehicle titles
8. Stock certificates, savings bonds and brokerage accounts
9. Partnership and corporate operating documents
10. Tax returns
11. List of bank accounts
12. List of all user names and passwords
13. List of safe-deposit boxes
14. Durable health-care surrogate
15. Declaration of Pre-Need Guardian
16. Power of attorney
17. Authorization to release health care information
18. Living Will
19. Do-not-resuscitate order
20. Personal and family medical history
21. Life insurance policies
22. Individual retirement accounts
23. Pension documents
24. Annuity contracts
25. Marriage license
26. Divorce Papers

Having these documents prepared will help the grieving process for your loved ones. Please contact our office so that we can guide you in the right direction with your estate planning or help you organize your current estate planning documents.

Priebe Investment
Plans invites you to a



**On Tuesday,
March 26th
at 12 noon**

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

Topic:

**Spring Clean Your
Finances**

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**

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

Baby Boomers Are Behind on Retirement Savings – and They’re Not Even Trying to Catch Up

Because Social Security won't be enough to sustain today's older workers in retirement, it's imperative that they save on their own for their golden years. Yet an alarming number of baby boomers are behind on retirement savings. In fact, 30% of boomers have no money set aside for their golden years, according to the Stanford Center on Longevity. And among those who *do* have savings, the median balance is just \$290,000 for boomers born between 1948 and 1953 and \$209,246 for those born between 1954 and 1959.

Given this major savings lag, you'd think more boomers would be taking steps to make up for lost time by ramping up their retirement plan contributions. In reality, only 40% of workers aged 55 to 64 are contributing to an employer-sponsored retirement plan.

Please click on the link below to continue reading the article by Marie Backman of The Motley Fool:

<https://www.fool.com/retirement/2019/01/05/baby-boomers-are-behind-on-retirement-savings-and.aspx>



Colorectal Cancer Awareness Month

Colorectal cancer is the third most common cancer in the United States and the second leading cause of death from cancers that affect both men and women. Colorectal cancer affects people in all racial and ethnic groups and is most common in people age 50 and older.

The good news? If everyone age 50 and older got regular screenings, 6 out of 10 deaths from colorectal cancer could be prevented. Communities, health professionals, and families can work together to encourage people to get screened.

How can Colorectal Cancer Awareness Month make a difference?

We can use this month to raise awareness about colorectal cancer and take action toward prevention. Communities, organizations, families, and individuals can get involved and spread the word.

Here are just a few ideas:

- Encourage families to get active together – physical activity may help reduce the risk of colorectal cancer.
- Talk to family, friends, and people in your community about the importance of getting screened for colorectal cancer starting at age 50.
- Encourage people over 50 to [use this interactive tool](#) to decide which colorectal cancer screening test they prefer.
- Ask doctors and nurses to talk to patients age 50 and older about the importance of getting screened.

Click on the link for more information :

<https://healthfinder.gov/nho/MarchToolkit.aspx>

TRIVIA QUESTION

What Parker Brother's board game was invented March 1933?



Tune in to Walt of Priebe Investment Plans from 10am-11am every Wednesday on your 740AM dial and 8am-10am every Sunday on your 1230AM dial.



Daylight Savings is on Sunday, March 10th

Start Making those Summer vacation plans by using useful travel websites like the following:

www.airbnb.com
www.kayak.com
www.vrbo.com
www.tripadvisor.com

THANK YOU

We thank you for all the referrals throughout the year! We take great pride in assisting you and your friends and family with all their financial concerns and issues. Thanks again and keep the referrals coming!

CLIENT CELEBRATIONS

Client Birthdays

Sunshine Baldino
James Demarais
Florence Ehrenpreis
Marty Fields
Esther Gerardi
Debra Hill
Denise Kessel
Susan Lichtman
LaDona Lichtman
Kelly Paterson
Maxine Roach
Diane SanAnton
Anthony Versace
Renee Seal
Robert Wright, Sr.
Christine Waterhouse
Carol Zupp



Wedding Anniversaries

Marty & Lynn Fields
Bill & Phyllis Kraus
Allen & Sylvia Rosenfeld
Leonard & Carol Singer



TRIVIA ANSWER

\$\$ Monopoly, one of Walter's favorite games!

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Rosie's

RECIPE CORNER



Shepherd's Pie

Ingredients:

4 large potatoes, peeled and cubed
1 T. butter
1 T. finely chopped onion
¼ cup shredded Cheddar cheese
Salt and pepper to taste
5 carrots, chopped
1 T. vegetable oil
1 onion, chopped
1 lb. lean ground beef
1 T. ketchup
¾ cup beef broth
¼ cup shredded Cheddar cheese

Bring a large pot of salted water to a boil. Add potatoes and cook until tender but firm, about 15 minutes. Drain and mash. Mix in butter, finely chopped onion and ½ c. shredded cheese. Season with salt and pepper. Set aside. Bring a large pot of salted water to a boil. Add carrots and cook until tender but still firm, about 15 minutes. Drain, mash and set aside. Preheat oven to 375 degrees F. Heat oil in a large frying pan. Add onion and cook until clear. Add ground beef and cook until well browned. Pour off excess fat, then stir in flour and cook 1 minute. Add ketchup and beef broth. Bring to a boil, reduce heat and simmer for 5 minutes. Spread the ground beef in an even layer on the bottom of a 2 quart casserole dish. Next, spread a layer of mashed carrots. Top with the mashed potatoes and sprinkle with remaining shredded cheese. Bake in the oven for 20 minutes or until potatoes are golden brown. Enjoy!