

THE AMERICAN INVESTOR

A SOPHISTICATED APPROACH TO BUILDING WEALTH



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The Second Time Around

A second marriage can create numerous estate planning challenges. The desire to provide for a current spouse and children from a previous marriage may require a more detailed strategy

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Introduction to Closed-End Funds and UITs

Many investors aren't as familiar with closed-end funds and UITs as they are with open-end mutual funds. But these pooled investment vehicles have some distinguishing characteristics and might serve a special purpose in your overall investment strategy.

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Putting Your Kids on the Payroll

There are a number of good reasons to involve children in the operation of a family business. Not only is it a good opportunity for teens and college students to earn money for their own expenses and gain valuable work experience, but there are several lucrative tax benefits available when parents employ their children.

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Where Have the Entrepreneurs Gone?

The overall rate of self-employment was 10% in 2014, having fallen steadily from its most recent peak of 12.2% in 1994. Men were nearly twice as likely as women to be self-employed: 12% versus 7%.

Source: Pew Research Center, 2015



Trusting in Trusts

About half of the wealthiest U.S. households are using a trust to protect certain assets.

*Net worth does not include primary residence.

Source: Spectrem Group, 2016

Share of investors who hold assets in a trust, by net worth*



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