



Greetings!

A year ago, we began our newsletter by sharing some of the major events that took place at the beginning of 2021 - including a new President and administration taking office as well as the bizarre and entertaining GameStop trading frenzy fueled by Reddit users. This year, we are all surrounded by news of inflation, market volatility, foreign conflicts, and more. While events on the world stage have shifted, taxes haven't gone away, nor has the importance of having a comprehensive financial plan.

We are excited to share in this newsletter an update on your tax documents, two informative articles on estate planning and charitable contributions, and the announcement of our Q1 2022 Webinar. Here are the details:

Aspen Capital Management Q1 2022 Webinar

When: Thursday, March 3rd from 12:00 - 1:00 PM MST

Agenda: 2021 Year in Review, Current Environment (Inflation & Volatility), What Lies Ahead

RSVP Details

To reserve your spot, please RSVP to the webinar by replying to this email or to Brynn at brynn@aspencapitalmgmt.com. Please note that technology limits the number of participants in the webinar, so reserve your spot early. A Zoom link will be sent out to attendees a day in advance.

Your Investments

Selecting The "Right" Nonprofit

Selecting the right nonprofit, among the over 1.5 million nonprofits currently in the U.S., can be a daunting task. This article from the American Endowment Foundation (AEF) provides different strategies used by philanthropic consultants to help you make the most of your charitable giving.

[Read More](#)



Your Financial Planning

[When Should I Review My Estate Plan?](#)

Understanding the specific events that occur in our lives and could indicate the need to review your estate plan is critical to your overall financial plan. Life changes fast, and having a plan in place to address a changing situation can save you and your family significant amounts of time and money.

Our friends at [Shaila Buckley Law](#) specialize in estate planning and recently shared a thoughtful article about different life events that might warrant an estate plan review.



[Read More](#)

Operations Team Update

[How To Obtain Your 1099s](#)

Happy tax season! Many have been asking about them, and they are finally here -- 1099s! The final round of 1099s have been uploaded to your client vault. Please note that the first correction cycle begins March 3rd and will continue until mid-April. Here is a short video to show you how to obtain your 1099 from the ACM client vault!

[WATCH VIDEO HERE](#)

[2-Factor Authentication Available For The Client Portal](#)

We are pleased to inform you that 2-factor authentication is now enabled to add an extra layer of security when logging into your ACM Client Portal. Please click on [this PDF](#) or watch the video tutorial below to set up your 2FA! Reach out directly to Rachel at rachel@aspencapitalmgmt.com with any questions.

[WATCH VIDEO HERE](#)

All the best,
Your Team at Aspen Capital Management

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