



eNewsletter

January 2020

Did You Know?

Your Annual Policy Statements are Coming Soon.

It's important to review your annual statement and ensure the information is correct. When you receive your annual statement, check these three things for accuracy:

1. Policy Information:

Verify that the correct name, address, phone number and email address are on the statement.

2. Policy Summary:

Review the summary of your policy, premiums, costs, and policy activity (if applicable) to determine if your coverage level is still adequate for your needs and that your payments are on track.

3. Beneficiary Designation:

Ensure the beneficiaries listed are correct. If you need to make a change, please submit a new [Beneficiary Designation Form](#) or call our Policy Services Team at 800-336-4538 for assistance.

The SECURE Act of 2019 is now in effect.

On January 1, 2020, the Setting Every Community Up for Retirement Enhancement (SECURE) Act became effective. This

5 Mistakes You May Be Making in Retirement Planning



Saving for retirement can be complicated. How much should you save? Which accounts should you invest in? How can you make the most of your savings? They're all difficult questions to answer. The best retirement savings plan will consider your unique needs and a variety of different factors. And yet, there are still a few common mistakes that everyone should avoid when planning for retirement.

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Thinking About the Unthinkable

landmark legislation contains a number of changes to the rules for estate planning and retirement finance and may require new strategies to accomplish your financial objectives. Fortunately, the expert Relationship Managers at AAFMAA Wealth Management & Trust LLC can help you understanding how these changes may affect your retirement and estate plans. Contact them today at 910-390-1873 or visit our website at aafmaa.com/wealth to request your complimentary portfolio review.

[Read more about the changes.](#)

All it takes for a successful PCS is following a few simple tips.

Jeanie Byrd, Military Spouse and AAFMAA Mortgage Services Customer Support Specialist, walks you through exactly what to do in this article. And when you're ready to make a move, call 844-422-3622 to speak with an AAFMAA Mortgage Services LLC Military Mortgage Advisor who can help you discover your best home purchase options.

[Read all about it](#) in the Learning Hub



No one likes to think about losing a spouse but, when you have to care for minor children, you can't afford to be unprepared. Still, there's a level of comfort in assuming that, in the event of a death, one parent will still be around to provide that care. But what if both parents are lost together? Who would take over guardianship of their children and how would this be determined? What if it were you and your spouse? How would you answer the same questions?

[Continue reading](#) in our [Learning Hub](#).

AAFMAA in the Community

SpouseLink Events in 2020



AAFMAA's SpouseLink Ambassadors proudly represented AAFMAA at incredible events for the military community across the country in 2019, and there's plenty more in store for the New Year. Get to know our [SpouseLink Ambassadors](#) and follow them on [social media](#) to stay up to date on their upcoming events and activities. From military family fairs to back-to-school events and MilSpouse luncheons, we'll be there to help celebrate all the best moments of 2020.

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