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Andrew Zittel, CLU, RFC



Bruce Frankel, MBA, CFP®

Thank You

Who do you know who could benefit from our care and risk-managed approach to preserving their hard earned/saved wealth? We are so grateful for your introductions—this is what enables us to continue to prudently grow while staying focused on your financial affairs.

Thank you for the opportunity to be of service.

Healthcare Reform - The Next 3 Years

A look at the changes coming in 2012, 2013 & 2014.

Companies sponsoring group health plans should be aware of the changes coming to the health insurance industry as part of the “second stage” of health care reform. An ongoing relationship with a licensed insurance and financial consultant can help you keep these major and minor adjustments on your radar.

What’s new for 2012? Insurers that issue group health plans will have to abide by some new requirements.

[Read more](#)

Payroll Tax Cut Extended Two Months

Paychecks won’t shrink; long-term jobless benefits will continue.

A last-minute gift to 160 million Americans. On December 23, Congress approved a 2-month extension of the payroll tax holiday that President Obama quickly signed into law. So we will not see shrunken paychecks come January. The new law also extends long-term unemployment benefits through February 29 and authorizes a 2-month reprieve on pay cuts to doctors by Medicare.

[Read more](#)

New Rules for Retirement Plan Fiduciaries

Coming your way: some of the most significant changes in 30 years.

The Department of Labor is following through on its promise to update the retirement plan landscape. Three major rule changes are scheduled for the near future. All retirement plan fiduciaries and administrators should be aware of them.

[Read more](#)

Contact Us

Yerba Buena Financial Partners, LLC

1783 Union St.
San Francisco, CA 94132
Phone: 415-334-8000
www.ybfp.com

What Beneficiaries Need to Know

What do you do when an account owner passes away?

If your loved ones have invested, saved or insured themselves to any degree, you may be named as a beneficiary to one or more of their accounts, policies or assets in the event of their deaths. While we all hope “that day” never comes, we do need to know what to do financially if and when it does.

[Read more](#)

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Yerba Buena Financial Partners, LLC | 1783 Union St. | San Francisco | CA | 94123