**CHANGES/REVISIONS**

**TEXT CHANGES**

**NU041**- This document has some blue bolded text in the text of the document that should not be there.

**WRONG DOCUMENT**

**NU044**- The title is Health Savings Accounts Overview. It is the wrong document though. We will send a new document in the list of reformatted document under the document number NU044.

**WRONG TITLE**

NU100- The title is Overview of Capital Gains and Losses and is wrong. The document is right though. The new title should be “Alternative Minimum Tax”

**LEVELS**

**HEALTH/MEDICAL TAB**- The folder “Long Term Health Care” appears twice in the Health/Medical tab. It appears as a sub-folder under the “Health Care Planning in Retirement” folder and then also as its own folder.

It should appear (and the documents under them) only once as a folder under the Health/Medical tab. The sub folder of Long-term care should disappear.

**PROTECTING FINANCES** tab has only one folder: Life Insurance. We should eliminate the sub folders and “promote” them to be folders so that the Protecting Finances tab has three folders with no sub-folders. The three folders would be the current sub-folders: “Life Insurance Considerations”, “Types of Life Insurance” and “Business Succession Planning”

Note that the current sub folder is “Business Planning”. It should be re-named “Business Succession Planning” and be a folder.

**DOCUMENTS THAT DO NOT APPEAR (A “Sorry Can’t Re-produce” message)**

**NU051**-The Individual Long-Term Care Product does not appear. We will provide this document to you.

**NU126**- What is the file and suspend strategy document does not appear. We will provide to you.

**DOCUMENTS THAT APPEAR BUT NEED TO BE RE-FORMATTED IN THE NUAnswers FORMAT**

We will re-format and provide the following documents to you.

**NU074-** Treasury Corporate Notes and Bonds

**NU091**- Types of Annuities

**NU-098**- Income Planning Techniques

**NU117**- Basics of Retirement Planning Vehicales

**NU118**- Funding Sources

**NU135**- Annuities for Income

**NU127**- Can a Person Obtain Higher Benefits by working past Retirement Age

**NU161**- Family Needs Analysis

**NU179**- Irrevocable Life Insurance and Crummy Powers

**DOCUMENTS WITH AUTHOR NAMES**

After discussion, we have decided to delete author names in all documents. The following documents have author names which need to be removed:

**NU023 NU048 NU054 NU111**

**NU054 NU024 NU055 NU113**

**NU055 NU037 NU096 NU168**

**NU095 NU042 NU095 NU169**

**DOCUMENTS THAT HAVE THE COPYRIGHT MESSAGE EITHER TOO CLOSE TO TEXT OR TOO CLOSE TO FOOTNOTES**

**NU027 NU115**

**NU038 NU143**

**NU039 NU144**

**NU041 NU146**

**NU049 NU147**

**NU052 NU148**

**NU055 NU149**

**NU056 NU150**

**NU057 NU152**

**NU071 NU155**

**NU078 NU158**

**NU081 NU159**

**NU083 NU167**

**NU087 NU168**

**NU096 NU171**

**NU101 NU174**

**NU102 NU175**

**NU103**

**NU105**

**NU106**

**NU107**