

Maximizing Financial Growth: Insights on HSAs and Smart Investment Strategies with Shaun Eddy

January 17, 2025

By Linda S. Ostovitz

In this episode of *Real Talk, Real Growth*, host Linda Ostovitz welcomes Shaun Eddy, CEO and partner at Oxford Planning Group. Shaun, a certified financial planner with a master's degree in financial analysis, explores the benefits and mechanics of Health Savings Accounts (HSAs). He explains how HSAs can grow tax-deferred and be used for medical expenses, particularly in retirement. The discussion covers the nuances of high-deductible health plans, qualified medical expenses, and the role of employers in contributing to HSAs. Shaun also stresses the importance of financial planning from an early age, tax efficiency, and the value of professional financial advice. The episode also provides practical budgeting tips, reducing credit card debt, and planning for future tax liabilities.

For more information, visit Shaun's website <https://oxfordplanning.com>.