

### Life Event Checklists:

- What Issues Should I Consider Before I Retire?
- What Issues Should I Consider During My Divorce?
- What Issues Should I Consider For My Aging Parents?
- What Issues Should I Consider If I Get A Promotion Or Raise At Work?
- What Issues Should I Consider If I Lose My Job?
- What Issues Should I Consider If My Parent Passed Away?
- What Issues Should I Consider If My Spouse Has Been Diagnosed With A Terminal Illness?
- What Issues Should I Consider If My Spouse Passed Away?
- What Issues Should I Consider When Buying a Home?
- What Issues Should I Consider When Getting Married?
- What Issues Should I Consider When Having (Or Adopting) A Child?
- What Issues Should I Consider When Starting A New Job?

### Recurring Checklists:

- As A Retiree, What Issues Should I Consider When Reviewing My Tax Return?
- As Someone Who Is Working, What Issues Should I Consider When Reviewing My Tax Return?
- Issues To Consider In A Client Annual Review Meeting.
- What Issues Should I Consider Before The End Of The Year?
- What Issues Should I Consider Before I Update My Estate Plan?
- What Issues Should I Consider When Reviewing My Health And Life Insurance Policies?
- What Issues Should I Consider When Reviewing My Property & Casualty Insurance Policies?
- What Documents Do I Need To Keep On File?

### Healthcare Flowcharts:

- Am I Eligible For Medicare Part A and Part B?
- Can I Make A Deductible Contribution To My HSA?
- If I Retire Early, Should I Buy Health Insurance Through The Health Insurance Marketplace?
- Will I Avoid IRMAA Surcharges On Medicare Part B & Part D?
- Will I Avoid Medicare Enrollment Penalties?
- Will I Be Enrolled Automatically In Medicare?
- Will I Have To Change Healthcare Coverage As I Transition Into Retirement?
- Will The Distribution From My HSA Be Tax Free?

### Social Security Flowcharts:

- Am I Eligible for Social Security Benefits as a Divorced Individual?

- Am I Eligible for Social Security Benefits as a Spouse?
- Am I Eligible for Social Security Benefits as a Surviving Spouse?
- Do I Qualify For Social Security Disability Benefits?
- Will I Avoid Social Security's Government Pension Offset?
- Will I Avoid The Social Security Windfall Elimination Provision?
- Will My Social Security Benefit Be Reduced?

### **Retirement Accounts Flowcharts:**

- Can I Avoid Taking My RMD After Reaching My Required Beginning Date?
- Can I Contribute To My Roth IRA?
- Can I Delay The RMD From The Traditional IRA I Inherited?
- Can I Do A Net Unrealized Appreciation (NUA) Distribution?
- Can I Do a Qualified Charitable Distribution From My IRA?
- Can I Make a Backdoor Roth IRA Contribution?
- Can I Make A Deductible IRA Contribution?
- Can I Make A Mega Backdoor Roth IRA Contribution?
- Should I Inherit My Deceased Spouse's IRA?
- Should I Contribute To My Roth IRA Versus My Traditional IRA?
- Should I Rollover My Dormant 401(k)?
- Will A Distribution From My Roth IRA Be Tax and Penalty Free?
- Will A Distribution From My Traditional IRA Be Penalty Free?
- Will My Roth IRA Conversion Be Penalty Free?

### **College Resources:**

- Is The Distribution From My 529 Plan Taxable?
- What Issues Should I Consider To Fund My Child's College Education?

### **Taxation Flowcharts:**

- Will I Have To Pay Tax On My Qualified ESPP?
- Will I Have To Pay Tax On The Sale Of My Investment?
- Will I Receive A Step-Up In Basis For This Gifted Property?
- Will I Receive A Step-Up In Basis For This Inherited Property?

### **Other Resources:**

- Am I Eligible For A Qualified Business Income Deduction?
- Issues To Consider As A New Client
- Important Numbers
- Should I Set Up A Traditional 401(k) For My Business?
- What Issues Should I Consider Before Closing The Estate?
- Will The Deductibility Of My Retirement Plan Contributions Be Impacted By The QBI Rules?