



## Resources To Share Throughout the Year

### January - March

- ▶ What Accounts Should I Consider If I Want To Save More?
- ▶ Can I Contribute To My Roth IRA?
- ▶ Can I Make a Backdoor Roth IRA Contribution?
- ▶ Can I Make A Deductible IRA Contribution?
- ▶ Should I Contribute To My Roth IRA Vs My Traditional IRA?

### October - December

- ▶ What Issues Should I Consider Before The End Of The Year?
- ▶ Can I Make A Deductible Contribution To My HSA?
- ▶ Should I Change My Medicare Coverage During Open Enrollment?
- ▶ Should I Consider Doing A Roth Conversion?

### April - June

- ▶ What Documents Do I Need To Keep On File?
- ▶ As Someone Who Is Working, What Issues Should I Consider When Reviewing My Tax Return?
- ▶ What Issues Should I Consider When Reviewing My Investments?
- ▶ Am I At Risk Of Having My Identity Stolen Or Being A Victim Of Fraud?
- ▶ As A Retiree, What Issues Should I Consider When Reviewing My Tax Return?

### July - September

- ▶ 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?
- ▶ Should I Consider Refinancing My Mortgage?