

Title	Topics
<u>January and February</u>	Review Ways To Save More RMD Management Review
<u>March and April</u>	Tax Return Review Cash Flow Check Up
<u>May and June</u>	Estate Document Review Employee Benefit Review
<u>July and August</u>	Reviewing Investments Beneficiary Review
<u>September and October</u>	Reviewing Insurance Coverage Open Enrollment Options Review
<u>November and December</u>	End Of Year Planning Capital Loss Planning

At ABC Financial, we work with you throughout the year to ensure you are on track to reaching your goals. Each month, we have a specific area in your financial life that we will review.

To schedule a meeting, please click [here](#)