

Title	Topics	Action Steps
<u>1st Quarter (Jan-March)</u>	Start The Year On The Right Foot It's Time To Review Your Tax Returns	Annual limits change every year and new legislation usually goes into effect at the start of the year. As such, we begin the year by reviewing critical planning items.
<u>2nd Quarter (April-June)</u>	Cash Flow Check Up Reviewing Investments	In the second quarter, we'll focus on reviewing cash flow and investments. These two strategies often overlap and it is imperative that they be reviewed annually.
<u>3rd Quarter (July-Sept)</u>	Insurance Review (Odd Years) Estate Planning Review (Even Years)	Alternating each year, we will cover 20-30 planning issues for insurance and Estate planning depending on the year.
<u>4th Quarter (Oct-Dec)</u>	Reviewing End Of Year Planning Opportunities	Starting in early October, we will begin to do end-of-year planning to make sure that we have addressed time-sensitive planning opportunities.

About ABC Financial:

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

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