

## IMPORTANT MILESTONES

## GUIDES



Having Or Raising A Child

What Issues Should I Consider When Having (Or Adopting) A Child?  
What Issues Should I Consider For My Child With Special Needs?  
What Issues Do I Need To Consider As My Child Becomes Independent?



Getting Married

What Issues Should I Consider When Getting Married?



Buying Or Selling A House

What Issues Should I Consider When Buying A Home?  
What Issues Should I Consider When Selling My Home?



Getting Divorced

What Issues Should I Consider During My Divorce?  
Am I Eligible For Social Security Benefits If I Have Been Divorced?



Starting Or Leaving A Job

What Issues Should I Consider When Starting A New Job?  
What Issues Should I Consider If I Lose My Job?  
What Issues Should I Consider With My Employer-Provided Benefits?



Starting Or Selling A Business

What Issues Should I Consider When Starting A Business?  
What Issues Should I Consider As A Business Owner Or 1099 Worker?  
What Issues Should I Consider When Planning For The Sale, Disposition, Or Succession Of My Business?



Opening Or Participating In A Retirement Plan

Common Pension Plans For Small Business Owners  
Common Retirement Plans For Small Business Owners  
Should I Set Up A Traditional 401(K) For My Business?  
Should I Establish A SEP IRA Or A Simple IRA Plan For My Small Business?  
Should I Roll Over My Dormant Traditional 401(K)?  
Will The Deductibility Of My Retirement Plan Contributions Be Impacted By The QBI Rules?  
Should I Contribute To My Roth 401(K)?



Making A Decision On Social Security

What Issues Should I Consider With My Social Security Retirement Benefits?



Making A Decision On Medicare

Should I Change My Medicare Coverage During Open Enrollment?  
Will I Be Enrolled Automatically In Medicare?  
Will I Avoid Medicare Enrollment Penalties?  
Am I Eligible For Medicare Part A & Part B?



Starting RMDs

What Issues Should I Consider When Reviewing My RMD?  
Can I Avoid Taking My RMD After Reaching My Required Beginning Date (RBD)?



Someone Passed Away Or Became Terminally Ill

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 If My Parent Passed Away?  
What Issues Should I Consider Before Closing The Estate?



Creating Or Changing Your Estate Plan

What Issues Should I Consider When Creating My Estate Plan?  
What Issues Should I Consider When Reviewing My Estate Planning Documents?  
What Issues Should I Consider Before I Update My Estate Plan?



Donating To Charity

What Issues Should I Consider When Establishing My Charitable Giving Strategy?  
Should I Use A Donor Advised Fund (DAF) When Giving To Public Charities?  
Can I Do A Qualified Charitable Distribution From My IRA?



Deciding Where To Save Or Invest

What Accounts Should I Consider If I Want To Save More?  
Where Should My Next Dollar Go?



Unique Life Situations Or Events

Issues To Consider When Starting Out Financially?  
What Issues Should I Consider For My Aging Parents?



Sudden Wealth Event

What Issues Should I Consider If I Experience A Sudden Wealth Event?