

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?
- ▶ Where Should My Next Dollar Go?
- ▶ Can I Make A Deductible IRA Contribution?
- ▶ What Issues Should I Consider When Reviewing Cash Flow?



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?
- What Issues Should I Consider If I'm Concerned About Outliving My Assets?
- ► 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?

