fpPATHFINDER

Most Popular Guides

The most popular guides may be useful when you least expect it. Keep this list handy so you can quickly navigate to the guides that can add depth to a conversation or use as an educational handout to help deliver clarity to your clients.

- **Important Numbers:** Stay up-to-date on the numbers that affect your clients using this quick reference guide.
- **OBBBA Comparison Guide:** This is a high-level overview of many of the key changes and start identifying where they may apply to your clients. It's designed to simplify a complex law and help advisors and clients navigate new rules with more clarity.
- **How Must I Take Distributions From The Traditional IRA I Inherited?** Covers important factors a client needs to consider when determining how they must handle distributions from their inherited traditional IRA.
- **Master List of Goals:** Help your clients identify and prioritize which goals are the most important to them.
- **Issues To Consider In Client Annual Review Meeting:** This checklist covers 40 of the most important planning issues to identify and consider during a client annual review meeting.
- **What Documents Do I Need To Collect For Filing My Tax Return?** This checklist covers the key issues to consider when preparing to file one's taxes.
- **Should I Consider Doing A Roth Conversion?** This flowchart addresses some of the major decision points to help guide clients through the conversation.
- **Issues To Consider As A New Client:** Focus on important questions to ask to identify possible planning opportunities for a new client.
- **What Issues Should I Consider At The Start Of The Year?** To help frame your conversations with clients who are looking to make a fresh start this year, we have created this checklist.
- **Taxation Guide To Withdraws And Income Sources:** This guide provides a high-level overview of the various accounts or assets from which clients might pull funds

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