

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 \(2026\)](#): Stay up-to-date on the numbers that affect your clients using this quick reference guide.



- ▶ [End Of The Year Planning Issues](#): This guide covers a number of planning issues that your clients need to consider prior to year-end to ensure they stay on track.



- ▶ [Client Annual Review](#): This checklist covers 40 of the most important planning issues to identify and consider during a client annual review meeting.



- ▶ [Inherited Traditional IRA Distribution Rules](#): 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.



- ▶ [Start Of The Year Planning Issues](#): To help frame your conversations with clients who are looking to make a fresh start this year, we have created this checklist.



- ▶ [AGI/MAGI Summary Guide](#): With this guide, you will have the tools to make a quick assessment of your client's AGI/MAGI when developing your tax planning recommendations.



- ▶ [New Client Review](#): This checklist covers 40 of the most important planning issues to identify and consider during a client annual review meeting.



- ▶ [Roth Conversion Decisions](#): This flowchart addresses some of the major decision points to help guide clients through the conversation.



- ▶ [Common Savings Strategies For Children](#): This summary guide can help clients understand different ways to save for children using accounts.