fpPATHFINDER

Resources To Share Throughout the Year

January - March

- Common Savings Accounts For Children
- 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?

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?
- Enrolling In Medicare
- What Issues Should I Consider When Reviewing My Property & Casualty Insurance Policies?
- Should I Consider Refinancing My Mortgage?

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?

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