YEAR-END
FINANCIAL REVIEW

STRATEGIC RETIREMENT PARTNERS

	Yes	No
• **Examine your emergency fund**	☐	☐
○ Does your emergency fund cover ar least 3-6 months of living expenses?	☐	☐
○ Do you need to replenish funds that may have been used this year?	☐	☐
• **Review your beneficiary designations**	☐	☐
○ Do you have named beneficiaries with contact information on all accounts?	☐	☐
○ Has your situation changed such that beneficiaries should be updated?	☐	☐
• **Review your insurance coverage**	☐	☐
○ Are your rates competitive for home and auto?	☐	☐
○ Do you have an adequate amount of life insurance?	☐	☐
• **Check up on your investments**	☐	☐
○ Are they risk and age appropriate?	☐	☐
○ Are they well-diversified?	☐	☐
• **Make contributions to tax-advantaged accounts like HSAs, 529s, IRAs, etc.**	☐	☐
• **Make charitable donations**	☐	☐
• **Establish financial goals for the coming year**	☐	☐
○ Consider savings & investment goals	☐	☐
○ Don’t forget the fun stuff too….experiences, purchases, etc.	☐	☐

Need more information?
Contact us or schedule a consultation.

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