

YEAR-END FINANCIAL REVIEW



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

Need more information?
Contact us or schedule a
consultation.

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