

Annual Financial Planning Roadmap

January - March	April - June	July - September	October – December
<ul style="list-style-type: none">• 401k contribution review• Annual pension and external document review• Quarterly progress reporting	<ul style="list-style-type: none">• Review Notice of Assessment from tax return• Quarterly progress reporting	<ul style="list-style-type: none">• Quarterly progress reporting	<ul style="list-style-type: none">• Year End Tax Planning<ul style="list-style-type: none">• Tax loss selling• Discuss financial planning priorities for following year• Quarterly progress reporting

Prioritized Financial Planning for

Cash flow review

Employee benefits update – 401(k), Amazon vested shares

Education planning discussion

Retirement planning – initial discussion and strategy

Insurance review and strategy

Estate documents – POAs in place?

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