TERRA BLUE
WEALTH MANAGEMENT

Financial Life Calendar

Q1:

- Prior Year Tax Letter
- Review Annual Income & Expenses
- Review Roth Conversions
- Review Goal Planning
- Equity Compensation Planning

Q2:

- Investments Deep Dive
- Tax Strategies & Rebalancing
- Insurance & Risk Mitigation
- Estate Planning & Beneficiary Review
- Charitable Giving

Q3:

- Tax Return Review & Analysis
- Goal Review & Financial Plan Progress
- Financial Education
- Roth Conversion Analysis
- Account Profile Review

Q4:

- Personalized Impact Report
- End of Year Tax Planning
- Analyze Company Benefits Plans
- Roth Conversion & Distribution Analysis
- Year In Review; Revisit Key Items

In 2022, Terra Blue Wealth Management became a B Corp™ which further solidified our commitment to purpose-driven work. B Corps are businesses that meet B-Lab's verified standards of social and environmental performance, transparency, and accountability. Visit our website to learn more.

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