



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

Certified



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We're part of a community using business as a force for good.

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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