

Financial Checklist

To help get where you want to be, it's critical to know where you are right now. Use this quick checklist to assess different parts of your financial life and note any major changes, opportunities, or questions you have. Feel free to add notes on any items not covered on the checklist and we will plan to discuss them during our next scheduled Plan Review meeting.

Check all boxes that apply to you, or that you'd like to know more about for the future.

Life Changes

What's new with you? Big events, like the ones listed below, can be the catalyst for changes to your financial strategy.

- | | |
|---|--|
| <input type="checkbox"/> Recently moved | <input type="checkbox"/> Had a severe illness or need for additional healthcare (you or a family member) |
| <input type="checkbox"/> Changed jobs/promotion | <input type="checkbox"/> Lost a loved one |
| <input type="checkbox"/> Lost a job | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Got married | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Ended a marriage | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Added to your family (birth or adoption) | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Received a gift or inheritance | <input type="checkbox"/> Other: _____ |

Taxes

Previously taken Coronavirus related distributions, new IRS regulations clarifying the SECURE Act provisions, might impact your taxes, so be sure to consult your tax professional.

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|---|--|
| <input type="checkbox"/> Forecasted 2022 and 2023 income | <input type="checkbox"/> Reviewed potential deductions and credits for 2022 |
| <input type="checkbox"/> Forecasted 2022 net investment income | <input type="checkbox"/> Tracked donations to charity and other financial gifts |
| <input type="checkbox"/> Stayed up to date on new tax acts and changes | <input type="checkbox"/> If applicable, maintained records of received unemployment benefits |
| <input type="checkbox"/> Kept track of important statements (mortgage payments, investment performance reports, etc.) | <input type="checkbox"/> Made any qualified charitable distributions |
| <input type="checkbox"/> Started repayment of coronavirus distributions | <input type="checkbox"/> Other: _____ |

Retirement

It's always the right time to save for your retirement. Make sure you're informed about the status of your accounts and any upcoming milestones.

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|---|--|
| <input type="checkbox"/> Checked status of all retirement accounts | Did You Reach Any Key Retirement Milestones? |
| <input type="checkbox"/> Maxed out 401(k) contributions, including catchups | |
| <input type="checkbox"/> Maxed out IRA contributions, including catchups | |
| <input type="checkbox"/> Took required minimum distributions | |
| <input type="checkbox"/> Opened a retirement plan if newly self-employed | |
| <input type="checkbox"/> Rolled over workplace retirement plan assets | |
| <input type="checkbox"/> Claimed Social Security benefits | |
| <input type="checkbox"/> Other: _____ | |
| <input type="checkbox"/> | |
| <input type="checkbox"/> | |
| <input type="checkbox"/> | <input type="checkbox"/> Age 50: Making catch-up contributions to IRAs and qualified retirement plans |
| | <input type="checkbox"/> Age 55: Taking distributions from 401(k) plans without penalty, if retired |
| | <input type="checkbox"/> Age 59 ½: Taking distributions from IRAs without penalty |
| | <input type="checkbox"/> Ages 62 to 70: Applying for Social Security benefits |
| | <input type="checkbox"/> Age 65: Applying for Medicare |
| | <input type="checkbox"/> Age 72: Starting to take required minimum distributions (RMDs) from your IRA account(s) |



