Annual Family Stewardship Checklist Year ______*

January	February	March
Plan for the Year's Non-Recurring Expenditures	Review Annual Budget Projections	Prepare for Prior Year's Tax Preparation
	Establish a Charitable Giving Plan	Begin Tax Planning for Current Year

April	May	June
Any Milestone Birthdays?	Review Estate Planning Strategies	Insurance Review
(e.g. 50, $59^{1/2}$, 62, 65, 67, $70^{1/2}$, 72)	Confirm Asset Ownership & Beneficiaries	(Property, Casualty, Life, Disability, & LTC)

July	August	September
Investment Portfolio Review	Review Banking Relationships	Personal Debt Review

October	November	December
Review Actual Spending & Compare to Budget	Year-End Tax Planning	Donations & Gifts
Employee Benefits Review / Review Medicare		

*Add your annual family financial planning activities to your calendar. Utilize technology so you receive reminders throughout the year. Listed activities are recommendations only. Add additional activities and make adjustments as necessary.

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