

MEETING AGENDA

YEAR END PLANNING

BARNUM
FINANCIAL GROUP
THE SKG TEAM

The below items will be discussed during our next meeting:

- Life changes - what's new or different?
- Review of annual accomplishments
- Tax harvesting
- RMD planning (if applicable)
- Gifting
- Account contributions and conversions (if applicable)
- Is there anything else you want to ensure we cover?

SKG TEAM AT BARNUM FINANCIAL GROUP

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Follow us on social media to stay up to date on upcoming events.

