

# 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           |
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| APRIL   | MAY                                     | JUNE  |
| Any Milestone Birthdays?  | Review Estate Planning Strategies       | Insurance Review                              |
| (e.g. 50, 59 <sup>1/2</sup> , 62, 65, 67, 70 <sup>1/2</sup> , 72) | Confirm Asset Ownership & Beneficiaries | (Property, Casualty, Life, Disability, & LTC) |
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| JULY  | AUGUST                                  | SEPTEMBER                                     |
| Investment Portfolio Review                                       | Review Banking Relationships            | Personal Debt Review                          |
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|   |   |   |
| OCTOBER   | NOVEMBER                                | DECEMBER                                      |
| Review Actual Spending & Compare to Budget                        | Year-End Tax Planning                   | Donations & Gifts                             |
| Employee Benefits Review / Review Medicare                        |   |   |
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\*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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