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## 2026 Financial Checklist

Start the new year with a fresh look at your financials.  
Here is a checklist to get you started:

### THINGS TO REVIEW:

- Life Insurance Needs
- Car Insurance Quotes
- Homeowner's Insurance
- Annual Credit Report
- 2025 Spending Summary

### WHAT TO PLAN FOR:

- Retirement and tax changes
- Income strategy for retirement
- Major expenses
- Managing capital gains taxes

### QUESTIONS TO ASK:

- Does my portfolio need to be rebalanced?
- How much risk am I taking?
- What are my different Social Security options?
- When do I need to start my RMDs?
- Am I maximizing my retirement plan contributions?

### MAKE SURE TO UPDATE:

- Beneficiaries on life insurance policies
- Beneficiaries on IRAs and 401(k)s
- Digital Estate Plan
- Powers of Attorney and Living Wills
- Trusted Contact form

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*Registered Investment Advisers*  
Financial Planning & Investment Management

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