2021 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
- ☐ 2020 Spending Summary

WHAT TO PLAN FOR:

- ☐ SECURE ACT retirement and tax changes
- ☐ Income strategy for retirement
- ☐ Major expenses
- ☐ Managing capital gains taxes

QUESTIONS TO ASK:

- ☐ Does my portfolio need to be rebalanced?
- ☐ Do I have any sustainable investments?
- ☐ How much risk am I taking?
- ☐ What are my different Social Security options?

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

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Registered Investment Advisors

3-Point Financial Advisor Checklist

☑ Are you a "Fiduciary"?

☑ Are you only compensated by the advice you give and not by products you sell?

☑ Is Financial Planning and Investment Management included in your service?