



# 2020 Financial Checklist

**Start the new decade 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
- 2019 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



Guiding  
You Toward  
Financial  
Security

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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?