Fall Into Financial Planning

Year-End Review Checklist

The close of the year is more than a time for numbers—it's a chance to pause, reflect, and realign. Use this worksheet to spark a meaningful conversation with your MBI financial planner as you look back on this year's progress and set intentions for the year ahead.

Key Checkpoints

Let's review the essentials together:

Retirement Contributions: Am I on track to maximize 401(k), IRA, or HSA contributions before year-end?:

Tax Strategy: Have I taken advantage of year-end opportunities like charitable giving or investment adjustments?

Deadlines: Have I completed RMDs or used remaining FSA funds?

Life Changes: Did any major events (marriage, job change, move, new child) impact my plan this year?

Big Picture: Am I positioned to start next year with a clear financial plan and renewed focus?

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Look Ahead

Three priorities I want to focus on in the new year:

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What I want to feel more confident about in my financial plan:

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The Conversation

Use these prompts to guide your discussion with your planner:

- [ ] What changes should I make before December 31?
- [ ] How can I better prepare for next year's financial goals?
- [ ] What are we tracking or adjusting heading into 2026?
- [ ] Are there new opportunities I should consider based on my goals?

Planner Discussion Notes:

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From Reflection to Action

A thoughtful review now can help you close the year with clarity and start the next with purpose. Bring this worksheet to your next planning meeting and use it to guide an open, forward-looking conversation.

Start the Conversation with MBI

Chuck Kimmel
Financial Planning and Wealth Management Associate
CKimmel@cbmcpa.com