



INVESTMENT MANAGEMENT • FINANCIAL PLANNING • RETIREMENT PLANNING

Your Year-End Financial Checklist

- Take Your Required Minimum Distributions
- Max Out Your Employer Retirement Plan (401k) Contributions
- Review Cash Holdings
- Be Aware of Capital Gains Distributions
- Consider Tax Loss Harvesting
- Consider Roth IRA Conversions
- Leverage Your FSA Dollars
- Make Charitable Contributions
- Confirm Your Beneficiaries