YEAR-END FINANCIAL CHECKLIST

PERSONALIZED, FEE-ONLY FINANCIAL PLANNING AND INVESTMENT MANAGEMENT FOR YOUNG PROFESSIONALS, COUPLES, ENTREPRENEURS AND EMPLOYEES WITH EQUITY COMPENSATION

NEED A FINANCIAL TUNE-UP?
LET US HELP YOU ACHIEVE YOUR FINANCIAL GOALS BEFORE THE END OF THE YEAR!

ORGANIZE & AUTOMATE YOUR ACCOUNTS

FUND YOUR 401(K), HSA, 529S (KNOW THE LIMIT CHANGES!)

REBALANCE YOUR PORTFOLIO/TAX LOSS HARVESTING

CONVERT TO A ROTH IRA (IF ELIGIBLE)

CONTRIBUTE TO A DONOR ADVISED FUND OR CHARITABLE ORGANIZATION

CHECK ON YOUR ANNUAL SUBSCRIPTIONS

RE-VISIT YOUR BUDGET & CASH FLOWS

TAX-PLANNING FOR 2023

SHERMAN WEALTH MANAGEMENT