



Access to financial education, for all.

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Money Series / Youth Analysts / Youth Givers / Mentor Pros

Workshop | Spring Cleanup Checklist

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Intro | *Your Spring Cleanup Checklist*

*“If a cluttered desk is a sign of a cluttered mind,
of what, then, is an empty desk a sign?”*

Albert Einstein

Intro | *Checklist of Questions*

What do you own?

Who do you owe?

Who gets what when you die?

What mess have you left behind?

How is your money doing?

How can you keep more?

How can you earn more?



Focus Area | *Assets*

What do you own?

Create a balance sheet

Gather your recent statements

Protect your online access

Focus Area | *Debts & Liabilities*

Who do you owe?

Mortgage rate review

Pay off credit card debt

Consolidate debts to lower rate

Focus Area | *Beneficiaries*

Who gets what when you die?

IRAs and retirement accounts

Life Insurance

Payable on Death

Transfer of Death

Review life changes (birth, death, divorce, etc.)

Focus Area | *Estate Planning*

What mess have you left behind?

Do you have a Will?

Charitable intentions

Trustees and Power of Attorney

Easy account access for my loved ones



Focus Area | *Investments*

How is your money doing?

Review asset allocation

Look at your fees

Simplify your setup

Focus Area | *Tax Planning*

How can you keep more?

Big losses or big gains?

Contemplating sale of business?

Recent inheritance

Life changes (retirement, job change, etc.)

Tax-deferred savings – employer / self



Focus Area | *Self Advancement*

How can you earn more?

Professional development

When was your last raise?

Doing what you love?

Disclosure

This presentation was designed to enhance your understanding of various financial planning topics. This was presented as generic information and may not apply to your particular circumstances.

Given this, I strongly encourage you to seek professional advice from as many sources as possible. This advice may take the form of tax and legal professionals as well as your investment adviser.

Questions or Comments?

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Thank You
for your participation.

