PATHWISE GROUP

Year-end financial checklist (December)

- ☐ Review and celebrate this year's progress
- ☐ Write down lessons from your successes and challenges
- ☐ Choose two or three priorities for 2027
- ☐ Check with your plan administrator or tax professional about final contribution opportunities
- ☐ Check whether any required distributions apply to you
- ☐ Review benefit elections and flexible spending or health savings account rules
- ☐ Confirm beneficiary designations are current
- ☐ Gather and organize your financial documents
- ☐ Tidy up accounts and subscriptions
- ☐ Schedule time in January to start your first step