PATHWISE GROUP

Your year-end planning checklist

- [ ] Reflect on this year's progress and write down your wins
- [ ] Choose how you want to give this season, and keep records of your gifts
- [ ] Review your workplace retirement plan contributions with your plan administrator
- [ ] Review your benefit elections and coverage
- [ ] Confirm your beneficiary designations are up to date
- [ ] Review your savings, debt, and account statements
- [ ] Write down your year-end tax questions for your tax professional
- [ ] Pick one or two priorities for the year ahead