GLOBAL
WEALTH ADVISORS

Last-Chance
Planning Checklist
for 2017

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Forget New Year's Resolutions
Make a year-end resolution to shape up your finances

Now is the time to check the overall health of your financial plans

TAX REVIEW
- ☐ 2017 Deductions & Credits
- ☐ 2017 Investment Income
- ☐ Unrealized Gains & Losses
- ☐ Cost-Basis for Securities Sold
- ☐ Charitable Donations
- ☐ 2016 Loss & Carry-Forward
- ☐ Sale of Property (real/personal/business)

INSURANCE REVIEW
- ☐ Current Costs for Insurance Policies
- ☐ Effect of Life, Business & Financial Changes
- ☐ Property & Casualty Insurance Policies
- ☐ Life Insurance Coverage

HEALTH REVIEW
- ☐ Employer's Health Insurance Plan
- ☐ State Health Insurance Exchange
- ☐ HSA & FSA Contributions
- ☐ FSA Balance and Spending
- ☐ Medicare Enrollment

INVESTMENT REVIEW
- ☐ Goals and Strategies
- ☐ Asset Allocation and Rebalancing
- ☐ Portfolio Positions
- ☐ Income & Savings Needs
- ☐ Dividend Distributions
- ☐ Stock Options
- ☐ Loans and Debt

MILESTONE REVIEW
- ☐ AGE 50: Catchup Contributions to IRAs and Some Qualified Plans
- ☐ AGE 55: Take Distributions from 401(k) Without Penalty if Retired
- ☐ AGE 59 ½: Take IRA Distributions Without Penalty
- ☐ AGE 62-70: Apply for Social Security
- ☐ AGE 65: Apply for Medicare
- ☐ AGE 70 ½: Take RMDs from IRA

RETIREMENT REVIEW
- ☐ Max Out 401(k) Contributions, Including Catch-Ups
- ☐ Max Out IRA Contributions, Including Catch-Ups
- ☐ Analyze ROTH IRA Conversion Scenarios
- ☐ Take Required Minimum Distributions

Call us to schedule a review