Tailored Wealth Review Calendar

Wealth Accumulators · Pre-Retirees · Retirees

Q1

Investment Performance
Review last year's portfolio performance, highlighting key wins, challenges, and areas for potential improvement.

Retirement Accounts
Assess retirement account contributions, allocations, and progress toward long-term retirement goals.

Budget Review
Analyze spending, savings, and cash flow to ensure alignment with financial priorities and goals.

Roth Conversions
Explore Roth conversion opportunities to optimize taxes and maximize long-term retirement savings.

Q2

Tax Return Review
Analyze your tax return to uncover opportunities for reducing future taxes and leveraging the tax code to your advantage.

Key Focus Areas:

- Income sources
- Deductions and credits
- Capital gains and losses
- Retirement contributions
- Equity compensation

Identity Theft Protection
Review strategies to safeguard your personal and financial information.

Q3

Education Planning
Evaluate savings strategies, 529 plans, and funding options to ensure educational goals are on track.

Insurance Review
Assess insurance policies to ensure adequate coverage and alignment with financial goals.

Legacy Planning
Review wills, trusts, and beneficiary designations to safeguard assets and ensure alignment with legacy goals.

Q4

Tax Loss Harvesting
Identify opportunities to offset gains by strategically selling underperforming investments.

Employee Benefits
Review workplace benefits to maximize value and optimize tax advantages.

Retirement Income
Develop strategies for sustainable and tax-efficient retirement income.

Medicare
Evaluate Medicare options to ensure comprehensive and cost-effective healthcare coverage.

You will receive an e-mail at the start of each quarter to schedule your quarterly review

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Subscribe to "Making Sense of Your Money"

Weekly actionable insights, financial tips, and expert guidance to help you simplify complex topics and confidently manage your wealth.

Your Tailored Weekly Wealth Roundup

Stay informed with our weekly email, featuring firm updates, client reminders, new content, and upcoming events to keep you engaged.

Quarterly Market Outlook Webinars

Gain valuable market and economic insight to help keep your financial plan aligned and prepared for what's ahead.

Virtual Client Appreciation Events

Join us for fun, engaging virtual events that celebrate our partnership while offering valuable networking opportunities with like-minded professionals.

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Getting in Touch

We're here to support you with ANY QUESTIONS you have at ANY TIME. For general inquiries or assistance, please email **clients@yourtailoredwealth.com**.

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Book a Meeting