



# Proactive Wealth Maintenance Calendar

## January

### Values, Vision & Maintenance

- Take January Assessment

## February

### Annual Review Preparation

- Complete Annual Review Survey
- Schedule Annual Review
- Tax filing preparation
- Schedule prior year IRA/ HSA contributions

## March

### Annual Reviews

- Update financial plan
- Retirement planning
- Tax minimization
- Portfolio review
- Prioritize planning maintenance

## April

### Annual Reviews, Continued

- Same as March

## May

### Annual Reviews, Continued

- Same as March

## June

### Estate Planning

- Take Estate Planning Assessment

## July

### Education Planning

- Take Education Assessment
- Schedule or complete FASFA

## August

### Insurance Policy Review

- Take Insurance Assessment

## September

### Tax Minimization

- Roth conversion analysis
- Year-end strategies
- Charitable giving
- Income tax projections
- Review tax return analysis

## October

### Tax Minimization, Continued

- Same as September

## November

### Wrap-Up

- Year-end deadlines
- Update task list
- 401(k) & 403(b) optimization
- 529 Plan distributions

## December

### Wrap-Up, Continued

- Same as November

The timing of your financial planning and wealth management needs may be different than this calendar. Contact us if your needs change or if you have major changes in your planning needs or your financial situation. One Life Financial Group does not provide legal or tax advice.

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