

## Annual Family Stewardship Checklist Year \_\_\_\_\_\*

JANUARY	FEBRUARY	MARCH
<b>Plan for the Year's Non-Recurring Expenditures</b> <hr/> <hr/> <hr/>	<b>Review Annual Budget Projections</b> <hr/> <b>Establish a Charitable Giving Plan</b> <hr/> <hr/> <hr/>	<b>Prepare for Prior Year's Tax Preparation</b> <hr/> <b>Begin Tax Planning for Current Year</b> <hr/> <hr/> <hr/>
APRIL	MAY	JUNE
<b>Any Milestone Birthdays?</b> (e.g. 50, 59 <sup>1/2</sup> , 62, 65, 67, 70 <sup>1/2</sup> , 72) <hr/> <hr/> <hr/>	<b>Review Estate Planning</b> <hr/> <b>Confirm Asset Ownership &amp; Beneficiaries</b> <hr/> <hr/> <hr/>	<b>Insurance Review</b> (Property, Casualty, Life, Disability, & LTC) <hr/> <hr/> <hr/>
JULY	AUGUST	SEPTEMBER
<b>Investment Portfolio Review</b> <hr/> <hr/> <hr/> <hr/>	<b>Review Banking Relationships</b> <hr/> <hr/> <hr/> <hr/>	<b>Personal Debt Review</b> <hr/> <hr/> <hr/> <hr/>
OCTOBER	NOVEMBER	DECEMBER
<b>Review Actual Spending &amp; Compare to Budget</b> <hr/> <b>Employee Benefits Review / Review Medicare</b> <hr/> <hr/> <hr/>	<b>Year-End Tax Planning</b> <hr/> <hr/> <hr/>	<b>Donations &amp; Gifts</b> <hr/> <hr/> <hr/>

\*Add your annual family financial planning activities to your calendar. Utilize technology so you receive reminders throughout the year. Listed activities are recommendations only. Add additional activities and make adjustments as necessary.