



Sucré-Vail

Wealth Advisors[®]

Achieving Financial Wellness without Unnecessary Risk

Let's tie up those loose ends

When it comes to money, we know it literally pays to attend to even the smallest of details, but sometimes, like during busy seasons of life, finding the time to do everything can feel overwhelming, if not downright impossible. Yet tying up all financial loose ends before the year-end is a must.

Before the holiday season jumps into full swing, here is a list of moves you may want-or need-to make so you can fully relax and enjoy the festivities:

1. Check the balance of your FSA – and decide how you will use the remainder.
2. Redeem any rewards points you've earned this year.
3. Find out what tax changes affected you this year and make adjustments (see article below).
4. Top up your retirement plan to the max – I've got ideas for you.
5. Retirees, be sure to take your RMD.
6. Calculate how much to give in year-end donations to your favorite charities for the greatest benefit.

From this list, break down your to-do's into manageable steps. I can guide you through the process and help keep you accountable – just ask. If it means you're making the most of your money, I'm happy to assist. And for more ideas, here are some hand-picked articles for you.



Margaret R Sucré-Vail, AIF®, AWMA®

Advisor

Sucré-Vail Wealth Advisors

Office : [888-286-9991](tel:888-286-9991)

margaret@sucrevailwa.com

www.sucrevailwa.com/



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Thanks,

Margaret & Henry



The 1929 Stock Market Crash Caught Nearly Everyone Off Guard. Are We Headed for a Similar Fate?

Oct. 25, 2021

B The Roaring '20s come to mind with the recent Federal Reserve report showing America's richest 1%...

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End-of-the-Year Income Tax Checklist

Oct. 25, 2021

(I) Here's what you should be thinking about tax-wise prior to year's end, as well as some lesser-...

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How to Protect Yourself From Online Card Fraud

Oct. 25, 2021

C People are expected to do much of their holiday shopping online this year even as the pandemic...

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How To “Treat” These 13 Financial “Tricks”

Oct. 25, 2021

F There will be lots of witches, zombies, vampires, and other monsters running around this...

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Santa Claus Is Coming—But He'll Skip Some Stores

Oct. 22, 2021



Americans have big shopping lists but face emptier shelves and less help this shopping season...

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4 Steps for Living Abundantly, Attracting Wealth and Better Business

Oct. 25, 2021



You want to make money — how much and why? You want to be healthier — how much weight do you want...

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16862 Royal Crest Dr - Houston, TX 77058

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