



# Sucré-Vail

## Wealth Advisors<sup>®</sup>

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.

Thanks,

Margaret & Henry



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