

FINANCIAL "WRAP-UP" CHECKLIST



- Remember to take your Required Minimum Distributions from your retirement accounts
- Make any last minute charitable contributions
- Spend the balance of your flexible spending account
- Think about gifting to reduce your taxable income
- Make an extra mortgage payment
- Consider making deductible business purchases by the end of the year
- Review and balance your capital gains and losses
- Consider increasing this year's final 401 (k) contribution
- Open and fund a college savings account for a loved one
- Make IRA contributions