WHAT ARE THE MONEY MOVES TO BE MAKING NOW?

RETIREMENT MOVES



Maximize contributions and utilize catch-up contributions

Contribute maximum to health savings account

Don't forget required minimum distribution



COMPANY BENEFIT REVIEW

Spend down FSA balances before they expire

Update company life, disability, and insurance plans

Don't miss dental or vision benefits



TAX RELATED ACTIONS

Harvest tax losses from investments to lower capital gains

Make charitable donations if qualify for deduction

Adjust withholding and change estimated tax payment

PERSONAL FINANCIAL MOVES



Check Social Security earnings record

Confirm beneficiary designations

Review last 90 days of expenses