

Career and Personal Finance Review

Q 4

REVIEW & PREP

- Assess your progress toward your career objectives
- Prepare for year-end performance reviews by gathering specific examples of achievements
- Update resume and LinkedIn Profile with recent accomplishments
- Seek feedback from supervisors and mentors
- Complete any remaining training and plan for next year's professional development
- Set career goals for next year

INVESTMENTS

- Rebalance your investments to align with your goals
- Maximize contributions to 401(k), IRA, and other accounts
- Explore tax-saving strategies before the end of the year

RETIREMENT PLANNING

- Review & Update beneficiaries to ensure designated beneficiaries on all financial accounts are up to date and accurately reflect your current wishes
- Take advantage of catch-up contributions if eligible
- Understand your Social Security benefits

SET NEW GOALS

- Set achievable career and financial goals for the next year
- Outline a financial strategy for the upcoming year
- Plan to expand your professional network

FINANCIAL HEALTH

- Evaluate your yearly income and expenses
- Confirm you have met or exceeded your savings goals
- Analyze and create a plan to manage any outstanding debts
- Check credit score and review credit report
- Review & update beneficiaries to ensure designated beneficiaries on all financial accounts are up to date and accurately reflect your current wishes

INSURANCE & EMERGENCIES

- Assess your health, life, and auto insurance coverage
- Ensure your beneficiaries are current and accurate
- Confirm you have enough funds for unexpected expenses

TAX SEASON PREP

- Explore tax-saving strategies (i.e. maximizing contributions to your retirement accounts) to optimize your financial position for end of the year
- Start organizing tax-related documents
- Make year-end donations for potential tax deductions

STAY INFORMED

- Follow financial news and industry trends
- Consider consulting a financial advisor or career coach
- Remember to balance your work and personal life

For more details, you may visit www.rebootmycareer.com.