



Wealth Management

Top Ten Financial “To Dos”

10. Check spending habits
9. Set up a budget for 2021- in depth
8. Set an annual financial goal-set milestones to reach goals
7. Focus on financials
6. Set up investment accounts
5. Meet with your tax advisor
4. Look at ways to increase income
3. Check your legal/medical documents
2. Invest in Yourself
1. Contact your Wealth Advisor