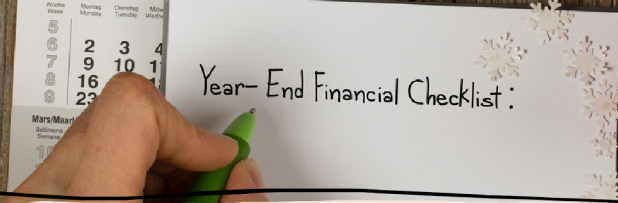


THE CASH CLUB



END OF YEAR PLANNING

"So, just like your annual physical, if you don't already take an annual snapshot of your financial picture, find some time over the holidays to do that. What that entails is up to you, but at a basic level I would suggest building your own "balance sheet" and potentially a cash flow plan for next year." Treasurer Briner.



TAKEAWAY

- A financial checkup is like an annual physical for your money.
- A year-end checklist helps people pause and review their financial situation.
- Year-end tax planning helps people make smart decisions before important deadlines pass.
- A will helps make someone's wishes clear.



ACTIVITY

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