WILL THIS BE THE YEAR YOU FINALLY...

20 THINGS YOU'VE LIKELY PUT OFF

By Mike Kura, RFP®

1. Create an incredible memory – take that dream vacation, for example
2. Create or update your will, trust and other legal documents to ensure your life wishes will be respected
3. Open a Roth IRA
4. Dust off that old life insurance policy to see if it's doing what you thought (or were told) it would
5. Create a budget...and stick to it
6. Have the "money talk" with your children
7. Get a health check-up...it's better to prepare than to repair
8. Stop saving more than you need for the future and live more today
9. Stop living too large today and save more for a secure and successful future
10. Hug a dog (see below - Sugar is available if you need help)
11. Review your investments to see if they suit your current financial situation
12. Create a plan to reduce your income taxes
13. Commit to not watching financial news. No, it is not different this time...the world is not coming to an imminent end.
14. Quit letting your emotions wreak havoc with your investments (they will typically lead you off course) and keep to your investment plan

15. Ruthlessly commit to paying off consumer debt

16. Review the beneficiaries on your investment accounts and insurance policies

17. Reconnect with an old friend or distant relative

18. Start giving more to others

19. Learn about and take advantage of the benefits offered by your employer – this is often free money

20. Get your financial life organized

Life isn't all about the numbers. Some of the most impactful investments we make aren't financial; they are investments in our loved ones and others. We call this Return on Life™.

Our Return on Life Index™ will provide you with a complimentary assessment of the extent to which you are using your wealth (time, talent and treasure) to improve your life and the lives of those around you. I invite you to invest seven minutes of your time to take the ROL Index™ at our web site - www.teamwia.com.

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