



START 2021 ON SOUND FINANCIAL GROUND

A new year and a new start to your goals. Follow these helpful tips to get your year started on a sound foundation!

REVIEW YOUR SPENDING PLAN

Look back on your spending for 2020 and see which areas you need to adjust for 2021. At the same time review your financial goals and make sure they still make sense for you. You may want to focus on those goals or add new ones.

FUND YOUR EMERGENCY ACCOUNT

Last year showed many of us why an emergency fund is important. Being prepared for unemployment or unexpected expenses is important. Aim to accumulate at least two or three months of living expenses for emergencies. However, the more you have put away the better.



SAVE FOR RETIREMENT

Keep putting money into your retirement accounts. Consider increasing your contribution, especially if it will gain you a larger employer match.

FINE TUNE YOUR FINANCIAL PLAN

While saving for emergencies and retirement, consult with your financial professional to ensure all your long-term financial goals are addressed. Evaluate all insurance coverage to make sure it is adequate or if you need to establish a trust.



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