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Spending / Budgeting

RSUs (vesting dates, next steps)

Estate Planning - Will, etc.



📈 In Progress 4

Old 401K --> IRA

Review Financial Plan in MoneyGuidePro

Investing Strategy (discuss allocations, etc.)

College Savings Strategy



✅ Done 4

✔️ Completed

Reserve Fund (how much, \$USFR vs. HYSA)

✔️ Completed

401K -- contributions, investments

✔️ Completed

† Bonds

✔️ Completed

Beneficiary Info (for IRAs)



@ Links/Cont... 2

Links: MoneyGuidePro, Investment accts @ Altruist, shared folder

Links: Contact, Make Appointment, Altruist Help

