

☑ Move Investments to VWP

High 🟢

☑ Create Income Plan

Medium 🟢

☑ Buy a 2nd House

Low 🔵

☑ Review Financial Plan

🟡 🔴

👤 Feb 1, 2024

☑ Plan a Vacation

High 🔵



☑ Investigate ESG Portfolios

Medium 🟢

☑ Life Insurance Review

Low 🟡

☑ Investment Portfolio Review

🟡 🟢

👤 Mar 15

☑ Estate Planning Blueprint

High 🟡

☑ ROTH Conversion

Medium 🟢 🟢

☑ Donor Advised Fund

Low 🟡 🟢

☑ New FedImpact Report

🟡

👤 Jan 15, 2024

☑ Review HDHP & HSA

High 🟡 🟡

☑ FEGLI Review

Medium 🟡

+ Add task

☑ Tax Report

🟡 🟢

👤 May 1

☑ Evaluate Cash Flow Strategy

High 🟢

+ Add task

☑ Healthcare Plan Review

🟡

👤 Nov 15