

Priority - Next 12 ...5⚡+...

On the Horizon - 1 ...3⚡+...


In the Future 3⚡+...

Recurring 8+...

Completed Tasks 3⚡+


✓ Create Income Plan

High📌

Monday


✓ Plan a Vacation

High📌

Aug 1


✓ Consolidate Investments at VWP

High📌

Aug 1

✓ ROTH Conversion

High📌📌


Nov 1

✓ Review HDHP & HSA

High📌📌


✓ Investigate ESG Portfolios

Medium📌

Mar 1, 2025


✓ Estate Planning Blueprint

Medium📌

May 1, 2025

✓ FEGLI Review


Medium📌

Jun 1, 2025

+ Add task


✓ Buy a 2nd House

Low📌




✓ Life Insurance Review

Low📌



✓ Donor Advised Fund


Low📌



+ Add task


✓ Annual Financial Plan Review

📌📌

Feb 1, 2025


✓ Refresh Federal Benefits Report

📌

Feb 15, 2025


✓ Tax Report

📌📌

May 15, 2025

✓ Healthcare Plan Review

📌


Nov 26

✓ Investment Portfolio Review

📌📌


✓ Tax Report

📌📌

May 1, 2023


✓ Evaluate Cash Flow Strategy

High📌

Jun 17, 2023

✓ Make a Large Purchase

📌



+ Add task