



faith . discipline . patience

Still got your financial New Year's resolution intact?

Save on the first of the month?

Update your will and beneficiary designations?

Consolidate all those accounts floating around here and there?

Get that expense tracking in place?

Figure out if you're on track to retire on time?

Review those old insurance policies that might have made a lot of sense at an earlier stage of your financial life?

Research those local nursing homes so you can tell your children where you'd prefer care provided?

Teach the grandchildren about investing – they're so young, imagine if they could compound their return for half a century!

There are so many aspects to our financial life it can quickly feel overwhelming.

Good news, you don't have to fix all of it at once.

They say the best way to eat an elephant is one bite at a time. Same here.

Pick the one financial to-do item you believe matters the most. Put all your energy and time into this and see it through.

If you succeed, you can move on to number two on your list.

And if you slip don't wait until next year. Instead, consider working on the quickest item on your list. This can create a feeling of success and hopefully give you energy to move on to another item.

If you prefer not to do this on your own you can always reach out to a professional.

Whatever your financial tasks, I hope this is the year you take care of them.

Good luck.

Jorgen Vik, CFP®

CERTIFIED FINANCIAL PLANNER™

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