fpPATHFINDER

Most Popular Guides

The most popular guides may be useful when you least expect it. Keep this list handy so you can quickly navigate to the guides that can add depth to a conversation or help you respond to an unexpected inbound call.

- **Important Numbers** Stay up-to-date on the numbers that affect your clients using this quick reference guide.
- **TCJA Sunset Provision Comparison Guide** Quickly navigate the upcoming tax changes that will take place and start having conversations with your clients about how their tax planning needs might change.
- **What Issues Should I Consider At The Start Of The Year?** Use this checklist to help your clients review their circumstances and create an actionable plan for realizing their resolutions.
- **What Issues Should I Consider Before The End Of The Year?** Lead conversations that cover end-of-year topics, including tax planning, investment and retirement accounts, charitable giving, cash flow and savings, insurance and estate planning.
- **What Issues Should I Consider Before And After The TCJA Sunset Provision Occurs?** Start having meaningful conversations with your clients about steps that can be taken now, and after the sunset occurs, to ensure they are making the most of their tax planning goals and needs.
- **Master List of Goals** Help your clients identify and prioritize which goals are the most important to them.
- **What Issues Should I Consider When Creating My Estate Plan?** This checklist covers the key issues to consider when a client is developing their estate plan.
- **What Issues Should I Consider Before I Retire?** This checklist covers 32 of the most important planning issues to identify and consider for a client who is about to retire.
- **Issues To Consider In A Client Annual Review Meeting** Provide a framework to ensure that major planning opportunities are addressed during annual client review meetings.
- **Should I Consider Doing A Roth Conversion?** This flowchart helps you walk your clients through the important considerations to weigh before doing a Roth conversion.
- **How Must I Take Distributions From The Traditional IRA I Inherited?** This flowchart covers important factors a client needs to consider when determining how they must handle distributions from their inherited traditional IRA.

Updated 09/01/2024.