



Thank you for purchasing *The Simple Road Toward Financial Freedom*.

Below is your gift: An Annual Review Checklist

There are 7 points we reviewed in the book that we strongly recommend you check on a yearly basis:

1. Review your budget and make adjustments if needed. Are you on target with your expenses? Did you get a pay raise? Can you increase your monthly 401(k), HSA, and/or savings contributions? Are your buckets still set up properly?
2. Check your credit report for errors. Review details on what goes into your credit score to see if any changes can be made to improve. You can go to: AnnualCreditReport.com to check your reports for free.
3. Confirm insurance needs are appropriate (auto, home, life) and make adjustments in policies as needed.
4. Do I have the right credit card for my current needs? Potentially explore other options.
5. Taxes: Should we make any moves to lower our taxes (tax-loss harvesting, DAF, etc.)?
6. Are all my documents in order (will, trust, POA, etc.)? Are my wishes still the same? Are my executors and beneficiaries still appropriate?
7. When could I potentially reach the million-dollar summit? Update your summit date yearly to help keep you motivated.

Thank you again for partnering with us!

As new authors, if you like our mission, we'd love your support in three ways:

1. Purchase a book (if you're reading this, you probably already have...thank you!).
2. Spread the word and get others to buy our book.
3. Leave a review on Amazon (good, of course!). You do not need to purchase on Amazon to leave a review.

We appreciate your support!

Mark and Steve

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