

# Client Year-End Tax Review Checklist

Have You...?

- Maximized Retirement Plan Contributions**
- Identified Opportunities for Capital Gains Harvesting**
- Identified Opportunities for Capital Loss Harvesting**
- Explored All Roth Conversion & Recharacterization Opportunities**
- Reviewed RMD Timing**
- Considered Charitable Gifts/ IRA Charitable Gifts**
- Reviewed Charitable Remainder Trust Opportunities**
- Maximized Annual Exclusion Gifts**
- Reviewed Use of 529 Plans & Coverdell Savings Accounts**
- Discussed Tax Bracket Management**
- Discussed Potential Deduction Timing**
- Reviewed Estate Plan Strategies**

“The hardest thing to understand in the world is the income tax”  
– Albert Einstein



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