

# Monthly Calendar

<b>2018</b>	<b>Theme</b>	<b>Take Action</b>	<b>Read-a-Long Book Title</b> <i>(with link to Amazon for more information)</i>
<b>January</b>	Prepare	De-Clutter; Gift; Delegate	<u><a href="#">The Heart of Money: A Couple's Guide to Creating True Financial Intimacy</a></u>
<b>February</b>	Change	Update Grab It Book™	<u><a href="#">Together Is Better: A Little Book of Inspiration</a></u>
<b>March</b>	Taxes	Scrutinize Tax Return	<u><a href="#">How to Think About Money</a></u>
<b>April</b>	Lifelong Learning	Celebrate Financial Literacy Month	<u><a href="#">Poor Charlie's Almanack: The Wit and Wisdom of Charles T. Munger</a></u>
<b>May</b>	Retirement	Evaluate Financial Plan	<u><a href="#">The Index Card: Why Personal Finance Doesn't Have to Be Complicated</a></u>
<b>June</b>	Risk Management	Read Insurance Policies	<u><a href="#">Insurance for Dummies</a></u>
<b>July</b>	Fun	Schedule Laughter Therapy	<u><a href="#">In For A Pounding</a></u>
<b>August</b>	Investing	Rebalance Portfolio	<u><a href="#">Think, Act, and Invest Like Warren Buffett: The Winning Strategy to Help You Achieve Your Financial and Life Goals</a></u>
<b>September</b>	Legacy	Review Documents	<u><a href="#">Tools of Titans: The Tactics, Routines, and Habits of Billionaires, Icons, and World-Class Performers</a></u>
<b>October</b>	Wise Debt	Get Credit Report	<u><a href="#">Your Money or Your Life: 9 Steps to Transforming Your Relationship with Money and Achieving Financial Independence</a></u>
<b>November</b>	Appreciation	Random Acts of Thankfulness	<u><a href="#">The Happiness Track: How to Apply the Science of Happiness to Accelerate Your Success</a></u>
<b>December</b>	Reflection	Set S.M.A.R.T.er Goals	<u><a href="#">Designing Your Life: How to Build a Well-Lived, Joyful Life</a></u>

## Salvini Financial Planning

30 San Miguel Street, Avila Beach, CA 93424 ph. 805.543.6622 [www.salvinifinancial.com](http://www.salvinifinancial.com)

### Our Mission

*Help our Clients make Good Financial Decisions that will pave the way to accomplish Cherished Goals and enjoy Peace of Mind.*

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March	Taxes	Scrutinize Tax Return	<u><a href="#">How to Think About Money</a></u>
April	Lifelong Learning	Celebrate Financial Literacy Month	<u><a href="#">Poor Charlie's Almanack: The Wit and Wisdom of Charles T. Munger</a></u>
May	Retirement	Evaluate Financial Plan	<u><a href="#">The Index Card: Why Personal Finance Doesn't Have to Be Complicated</a></u>
June	Risk Management	Read Insurance Policies	<u><a href="#">Insurance for Dummies</a></u>
July	Fun	Schedule Laughter Therapy	<u><a href="#">In For A Pounding</a></u>
August	Investing	Rebalance Portfolio	<u><a href="#">Think, Act, and Invest Like Warren Buffett: The Winning Strategy to Help You Achieve Your Financial and Life Goals</a></u>
September	Legacy	Review Documents	<u><a href="#">Tools of Titans: The Tactics, Routines, and Habits of Billionaires, Icons, and World-Class Performers</a></u>
October	Wise Debt	Get Credit Report	<u><a href="#">Your Money or Your Life: 9 Steps to Transforming Your Relationship with Money and Achieving Financial Independence</a></u>
November	Appreciation	Random Acts of Thankfulness	<u><a href="#">The Happiness Track: How to Apply the Science of Happiness to Accelerate Your Success</a></u>
December	Reflection	Set S.M.A.R.T.er Goals	<u><a href="#">Designing Your Life: How to Build a Well-Lived, Joyful Life</a></u>

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2016	Theme	Take Action	Suggested Reading <small>(with link to Amazon for more information)</small>
January	Prepare	De-Clutter Gift Delegate	<a href="#">The Life Changing Magic of Tidying Up</a>
February	Change	Update Grab It Book™	<a href="#">The Art of Possibility</a>
March	Taxes	Scrutinize Tax Return	<a href="#">The Retirement Savings Time Bomb</a>
April	Lifelong Learning	Celebrate Financial Literacy Month	<a href="#">Thinking Fast and Slow</a>
May	Retirement	Evaluate Financial Plan	<a href="#">The One-Page Financial Plan</a>
June	Risk Management	Read Insurance Policies	<a href="#">The Insurance Forum: A Memoir</a>
July	Fun	Schedule Laughter Therapy	<a href="#">Super Better</a>
August	Investing	Rebalance Portfolio	<a href="#">Low Fee Socially Responsible Investing</a>
September	Legacy	Review Documents	<a href="#">MONEY Master the Game</a>
October	Wise Debt	Get Credit Report	<a href="#">You're Nothing But a Number</a>
November	Appreciation	Random Acts of Thankfulness	<a href="#">What I Know For Sure</a>
December	Reflection	Set S.M.A.R.T.er Goals	<a href="#">Spark</a>

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2015	Theme	Take Action	Read-a-Long Book Title (with link to Amazon for more information)
January	Prepare	De-Clutter Gift Delegate	<a href="#">Shed Your Stuff Change Your Life</a>
February	Change	Update Grab It Book™	<a href="#">Decisive</a>
March	Taxes	Scrutinize Tax Return	<a href="#">Deloitte 2015 Tax and Wealth Planning Guide</a>
April	Lifelong Learning	Celebrate Financial Literacy Month	<a href="#">Just Give Me The Answers</a>
May	Retirement	Evaluate Financial Plan	<a href="#">Save Wisely Spend Happily</a>
June	Risk Management	Read Insurance Policies	<a href="#">Devil Take The Hindmost</a>
July	Fun	Schedule Laughter Therapy	<a href="#">Think Like A Freak</a>
August	Investing	Rebalance Portfolio	<a href="#">The Behavior Gap</a>
September	Legacy	Review Documents	<a href="#">The Intelligent Investor</a>
October	Wise Debt	Get Credit Report	<a href="#">The Little Book of Main Street Money</a>
November	Appreciation	Random Acts of Thankfulness	<a href="#">Appreciative Moments</a>
December	Reflection	Set S.M.A.R.T.er Goals	<a href="#">Seven Stages of Money Maturity</a>

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# Suggested Reading Bookshelf

<b>2013</b>	<b>Book Title and Author</b>
<b>January</b>	<p><a href="#"><u><i>The Power of Habit</i></u></a> Charles Duhigg</p>
<b>April</b>	<p><a href="#"><u><i>Your Money &amp; Your Brain</i></u></a> Jason Zweig</p>
<b>July</b>	<p><a href="#"><u><i>Playing the Winner's Game</i></u></a> Larry E. Swedroe</p>
<b>October</b>	<p><a href="#"><u><i>Who Gets Grandma's Yellow Pie Plate?</i></u></a> University of Minnesota</p>



# Salvini Financial Planning

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<b>2012</b>	<b>Theme</b>	<b>Take Action</b>	<b>Read-a-Long Book Title</b>
<b>January</b>	Success	Set S.M.A.R.T.er Goals	<u><a href="#">Autobiography of Ben Franklin</a></u>
<b>February</b>	Enough!	De-Clutter, Gift, Delegate	<u><a href="#">Your Money or Your Life</a></u>
<b>March</b>	Better Decisions	Take Money Quiz	<u><a href="#">Nudge</a></u>
<b>April</b>	Nat'l Financial Literacy Month	Learn Something New	<u><a href="#">The Investor's Manifesto</a></u>
<b>May</b>	Debt	Get Credit Report	<u><a href="#">Zero Debt</a></u>
<b>June</b>	Risk	Review Insurance Policies	<u><a href="#">The Little Book of Safe Money</a></u>
<b>July</b>	Retirement and Independence	Update Financial Projections	<u><a href="#">The Number</a></u>
<b>August</b>	Asset Allocation	Rebalance Portfolio	<u><a href="#">Bogle on Mutual Funds</a></u>
<b>September</b>	Taxes	Review Tax Return	<u><a href="#">The Retirement Savings Time Bomb</a></u>
<b>October</b>	College and Life Learning	Automate College Savings	<u><a href="#">The Best Way to Save for College</a></u>
<b>November</b>	Legacy	Know Elder Abuse Signs	<u><a href="#">The Boomer Burden</a></u>
<b>December</b>	Change	Embrace Change	<u><a href="#">Switch</a></u>

For Active Book Title Links: See [SalviniFinancial.com/Resources Tab/Monthly Calendar](http://SalviniFinancial.com/Resources Tab/Monthly Calendar)