

Monthly Calendar

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

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Our Mission

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