

Monthly Calendar

2017	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>

Salvini Financial Planning

30 San Miguel Street, Avila Beach, CA 93424 ph. 805.543.6622 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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2016	Theme	Take Action	Suggested Reading <small>(with link to Amazon for more information)</small>
January	Prepare	De-Clutter Gift Delegate	The Life Changing Magic of Tidying Up
February	Change	Update Grab It Book™	The Art of Possibility
March	Taxes	Scrutinize Tax Return	The Retirement Savings Time Bomb
April	Lifelong Learning	Celebrate Financial Literacy Month	Thinking Fast and Slow
May	Retirement	Evaluate Financial Plan	The One-Page Financial Plan
June	Risk Management	Read Insurance Policies	The Insurance Forum: A Memoir
July	Fun	Schedule Laughter Therapy	Super Better
August	Investing	Rebalance Portfolio	Low Fee Socially Responsible Investing
September	Legacy	Review Documents	MONEY Master the Game
October	Wise Debt	Get Credit Report	You're Nothing But a Number
November	Appreciation	Random Acts of Thankfulness	What I Know For Sure
December	Reflection	Set S.M.A.R.T.er Goals	Spark

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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	Shed Your Stuff Change Your Life
February	Change	Update Grab It Book™	Decisive
March	Taxes	Scrutinize Tax Return	Deloitte 2015 Tax and Wealth Planning Guide
April	Lifelong Learning	Celebrate Financial Literacy Month	Just Give Me The Answers
May	Retirement	Evaluate Financial Plan	Save Wisely Spend Happily
June	Risk Management	Read Insurance Policies	Devil Take The Hindmost
July	Fun	Schedule Laughter Therapy	Think Like A Freak
August	Investing	Rebalance Portfolio	The Behavior Gap
September	Legacy	Review Documents	The Intelligent Investor
October	Wise Debt	Get Credit Report	The Little Book of Main Street Money
November	Appreciation	Random Acts of Thankfulness	Appreciative Moments
December	Reflection	Set S.M.A.R.T.er Goals	Seven Stages of Money Maturity

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Suggested Reading Bookshelf

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



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

For Active Book Title Links: See SalviniFinancial.com/Resources Tab/Monthly Calendar