

The Year-End Top Ten:

Wealth and Tax Planning Strategies for
2003 and Beyond

The Year-End Top Ten

1. Ensure that you are fully invested
2. Fix your asset allocation drift
3. Manage your investment risks for current market conditions
4. Plan for charitable giving
5. Plan for family giving
6. Perform an annual review of your estate plan
7. Respond to recent estate tax law changes
8. Reap the full benefits of the Federal income tax cut
9. Avail yourself of “tried and true” income tax planning
10. Prepare yourself for changes in the tax laws

