

Conducting Your Mid-Year Financial Checkup

The midpoint of the year is a great time to review your financial position.

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RETIREMENT AND FINANCIAL PLANNING



With June officially behind us, it's time to face the facts: we're headed toward the second half of 2021. While there's still plenty of time to enjoy the rest of summer, we encourage you to slow down and check up on your financial well-being.

Review your budget.

Your spending habits likely look different now than they did in 2020, but did you adjust your yearly budget accordingly? The second half of the year can be expensive, between the holiday season and back-to-school spending. Take some time now to prepare.

Check your credit score.

If you plan on moving, purchasing a car, or taking out a personal loan this year, you'll want your credit score in good shape. Your score could have been impacted by recently accrued debt, late payments, hard credit inquiries, identity theft, and more.

Prepare for advanced tax credits.

If your family is eligible, you may begin receiving advanced child tax credits in July. Families who qualify are expected to receive six installments via direct deposit or mailed check. If you anticipate getting the credit, you may want to talk it over with your tax professional.

With 2021 looking different than last year, take some time to evaluate your financial standings as we prepare for the second half of the year.

Remember, we're always here if you need assistance reassessing or working towards your financial goals.

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