



Your year-end tax planning checklist

Kickstart your tax season planning with this list of important deadlines, relevant documents and strategy considerations.

With the end of the year fast approaching, now's the time to take advantage of tax-deferred growth opportunities, tax-advantaged investments, and charitable giving opportunities, among other strategies. You'll also want to maximize deductions and credits ahead of tax season.

As you consider these year-end options, sit down with your advisor to review your investments considering your goals, the tax environment and the economic landscape. The conversation can help identify where adjustments need to be made to position yourself for next year and beyond.

Use the year-end tax planning worksheet below to kickstart the conversation and keep you on track throughout the upcoming tax season.



[Year-End Tax Planning Worksheet](#)

Raymond James financial advisors do not render advice on tax or legal matters. You should discuss any tax or legal matters with the appropriate professional.