

It is time to SPRING CLEAN Your PFO!

This is the time of year when many are ready to do a big spring clean and we want to help you with a complete refresh of your PFO! Here are a few ideas to help you get your PFO in tip top shape for your next Meeting with us.

Step 1

Clear Out the Old

Remove any old items from your binder which may be out of date and/or no longer relevant to you. If you are afraid of letting go, you can paper clip or staple these items and store them somewhere else.

Step 2

Make Way for the New

Add any new items that are up-to-date and/or important for you to centralize in your PFO Binder.

Step 3

Identify Your Action Items

Carefully review the items in your binder and use post-It notes to flag areas you would like to discuss with us and/or update at your next meeting. Be sure to write down any questions you may have for us.

Step 4

Our PFO Enhancements for this Year

Included with this PFO Spring Clean Package are a few items to add to your PFO:

- Important Tax Dates
- Helpful Tips for Identify Theft Protection
- Password Protection

All these items are three-hole punched, ready to go, and located within the **plastic pouch** enclosed.

This plastic pouch can also be added to your PFO binder to hold items which do not easily 3-hole punch (too small or thick), items you do not want to 3-hole punch (original documents) as well as your Safety Deposit Box Key.

If you have any questions, feel free to contact us!