

# Fall 2024



## News You Can Use

The fall weather has arrived, and with it the last quarter of 2024. We hope you are enjoying all the fun activities that fall brings. At Financial Consultants Group, your team is working hard to ensure that your financial plan and asset management is in good shape, so that you can relax and enjoy this wonderful time of the year with family and friends.

### Five Things to do for Year-End Planning

*By Carolyn Flournoy, CFP®*

It's a good time of year to check in on your finances. Carolyn has developed some checklists for you to consider before the end of the year. The full article can be accessed below.

[Click Here to view the full article](#)



#### If You Are Retired

- Determine your 2025 monthly income needs
- Take all required minimum distributions (RMDs) by 12/31
- Review your charitable giving plans for the new year
- Review your estate planning documents

#### If You Are Still Working

- Make sure your emergency fund is in place
- Review your budget and debt reduction plan
- Review your employer retirement contributions
- Contribute to additional savings vehicles (IRA and HSA)

- Evaluate your home's condition
- Contribute to 529s for your children or grandchildren

## Our Team Appreciates Your Vote for Best of Forsyth!

The community has nominated us for Best of Forsyth once again for 2025! We appreciate you helping us win Best of Forsyth in prior years, and we are thankful for your support again.

Click Below:

- [To vote for us in Best of Forsyth](#)
- [To give us a Google Review](#)
- [To vote for us in Best of Georgia](#)



## How to Switch to Electronic Statements

Axos has the option to switch to electronic delivery for your quarterly account statements. If you would prefer to have statements sent to your email instead of paper statements in the mail, you will be able to make this change just by pressing a button.



[Click here to view instructions for switching to electronic statements](#)

## New IRS Tax Filing & Payment Deadlines

### Important Updates

The IRS has made several updates to filing and payment deadlines. Due to the recent hurricane, the following deadlines have now been extended to **May 1, 2025 for Georgia residents** for the following tax returns:

- > 2023 Individual Income Tax Returns
- > 2024 Individual Income Tax Returns
- > 2024 Business Tax Returns



## Notice of Privacy Practices and Awards Disclosures

Investment advisers are required by law to inform their clients of their policies regarding privacy of client information. We are bound by professional standards of confidentiality set by FINRA that are even more stringent than those required by law.

Our Privacy Policy tells you how we collect, share, and protect your personal information. The only change we made to our policy was the contact email address. You can find a copy of the policy by clicking on the link below.

[Click here to view our Privacy Policy](#)

[Click here to view our Awards Disclosures](#)



The image features the logo for Financial Consultants Group, Inc., which includes a circular emblem with the text "WORKING TOGETHER FOR YOUR FUTURE" and "ESTABLISHED IN 1996". To the right of the logo is a photograph of six professionals (three men and three women) standing together. Below the photo are the company's office addresses and contact information. To the right of the photo are several circular awards for "BEST OF FORSYTH" for various years, and a larger award for "BEST OF GEORGIA 2023".

**Main Office**  
1080 Sanders Road  
Suite 300  
Cumming, GA 30041

**Alpharetta Office**  
12600 Deerfield Parkway  
Suite 100  
Alpharetta, GA 30004

(770) 627-2121  
[ForYourFuture.net](http://ForYourFuture.net)

Financial Consultants Group, Inc. is a Registered Investment Advisor. Information presented is for educational purposes only and does not intend to make an offer or solicitation for the sale or purchase of any specific securities, investments, or investment strategies. Investments involve risk and unless otherwise stated, are not guaranteed. Be sure to first consult with a qualified financial adviser and/or tax professional before implementing any strategy discussed herein.

Financial Consultants Group | 1080 Sanders Road Suite 300 | Cumming, GA 30041 US

[Unsubscribe](#) | [Update Profile](#) | [Constant Contact Data Notice](#)



Try email marketing for free today!