



## DECEMBER NEWSLETTER

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### There is still time to Open Enroll for Healthcare!

Did you know that Eagle Financial Group, a division of the Bank of Cashton, can help you find a health Insurance plan? We can help you enroll in a health insurance plan. Call 608-654-5121 to schedule an appointment.

We can help you reassess your healthcare needs and make adjustments to ensure you have appropriate coverage for the 2025 year.

- Enroll in health insurance plan if you don't already have coverage.
  - Change your existing health insurance plan.
  - Add or remove dependents from your coverage.
  - Cancel your current coverage.
  - Review any changes to your current plan's benefits or costs.
  - Explore new plan options that may better suit your needs or budget.
  - Take advantage of any new benefits or programs offered in the marketplace.
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### HSA Tax Time



Did you know you can still contribute to your HSA for the 2024 Tax year. Talk to our specialized account representatives to find out more information.

Please stop in or give us a call at 608-654-5121

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# Year- End Checklist

A lot can change in a year, and you may be surprised how your new circumstances have impacted your finances. Since your financial wellness can affect many aspects of your life, it is crucial to review your strategy yearly.

## End of Year Checklist



### Review Your Accounts

Check account balances and transactions

- Review all your bank accounts
- Verify that all transactions are accurate and report any discrepancies to your bank

Update account information

- Ensure your contact details, address, and beneficiaries are up to date
- Consider adding or removing authorized users if needed

### Maximize Savings and Investments

Max out retirement contributions

- Contribute the maximum allowed amount to your 401(k) or IRA before December 31
- Consider catch-up contributions if you're 50 or older

Review investment portfolio

- Access your investment strategy and rebalance is necessary
- Consider tax-loss harvesting to offset capital gains

### Prepare for Taxes

Gather tax documents

- Collect all necessary tax forms and receipts

Make Charitable donations

- Donate to eligible charities before year end for potential tax deductions
- Request and keep receipts for all charitable contributions

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## Christmas Day







The Bank of Cashton wishes everyone a Merry Christmas!



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**BANK OF CASHTON MOBILE APP**

The Bank of Cashton Mobile App delivers a full suite of financial tools right at your fingertips. Our app supplies you with fast, secure access to your accounts. It's like having a bank branch in your pocket.

-  >Transfer between accounts
-  >Person to Person Payments
-  >Submit Travel Notices
-  >Check account balances
-  >Freeze your Debit Card
-  >Mobile deposit

Learn more about the B of C App

Visit our Website

## 24/7 BANKING

Please continue to use the Bank of Cashton's digital tools and other resources for self-service banking and 24/7 account access. You can conveniently access your account 7 days a week 24 hours a day by checking your accounts **online**, through our 24 Hour Transaction line at 1-800-461-7430, or by using the Bank of Cashton's **mobile app**.

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