



NEWS RELEASE

T. ROWE PRICE EXPERTS PUBLISH 2021 FINANCIAL CHECKLIST FOR RETIREMENT SAVERS

BALTIMORE, January 28, 2021 – T. Rowe Price, a global investment management firm and a leader in retirement, has published a 2021 monthly financial checklist featuring expert tips for retirement savers. With the financial challenges many investors face due to the Global Pandemic, the new year is an opportunity to review financial plans and refocus financial goals.

The checklist acts as a monthly financial guide for investors, providing tips and ideas for building a plan with checkpoints along the way to ensure investors continue to track their progress throughout the year.

“The most successful plans aren’t ‘one and done’; they are revisited and adjusted regularly,” said Roger Young, CFP®, senior financial planner at T. Rowe Price. “Things can change throughout the year, but a thoughtful plan can keep investors focused.”

The first three months of the 2021 checklist can be found below. The comprehensive list can be found [here](#).

January: Set your intentions

- Prioritize your goals. Start categorizing by what’s urgent, what’s important, and what can wait.
- Draft a 2021 budget. Look at last year’s income and expenses and set your plan.
- Make your 2021 IRA contribution. You have the potential to earn thousands more over the long term by making contributions earlier in the year.

February: Prepare for tax time

- Get organized. Gather last year’s forms and records. Make sure you have access to all documents needed.
- File your taxes. Submit your return as soon as you’re ready but no later than April 15, 2021.
- Invest your tax refund. You can choose to have your refund deposited directly into an investment account.

March: Simplify your investments

- Don’t forget your old 401(k). You have a few options. Consider factors like tax benefits, investment choices, and costs to determine what’s right for you.
- Streamline holdings. Asset allocation funds provide a diversified portfolio in a single investment and are rebalanced regularly.

ABOUT T. ROWE PRICE

Founded in 1937, T. Rowe Price (NASDAQ-GS: TROW) is an independent global asset management company with \$1.47 trillion in assets under management as of December 31, 2020. The firm is focused on delivering investment excellence and retirement services for institutional, intermediary, and individual investors. Our strategic investing approach, driven by independent thinking and guided by rigorous research, helps clients feel confident in pursuing financial goals. For more information, visit [troweprice.com](https://www.troweprice.com), [Twitter](#), [YouTube](#), [LinkedIn](#), [Instagram](#), or [Facebook](#).

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