



Year-End Tax Planning Opportunities

While Santa is making his list and checking it twice, the Abacus team is reviewing our [year-end planning checklist](#) for each of you. Tax loss harvesting complete? Maxed out your contributions to your 401(k), including a catch-up contribution for those over 50? Reviewed your Prescription Plan D options during the annual open enrollment ending December 15th? Charitable gifting complete in a tax-savvy manner? Wrapping up the year with a sense of accomplishment always brings a sense of peace!

Holiday Gift Guide

Need a bit of inspiration for your holiday shopping list? Abacus has a ["nice list"](#) for one and all—from toys to books to experiences. Share the gift of financial literacy for life.



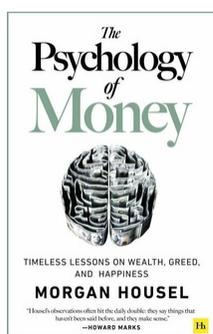
Meet Our Team

Abacus's Accounting Manager [Idene Thompson](#) embodies several of Abacus's cultural norms: [practicing gratitude](#), [committing to radical responsibility](#), and [seeking mastery](#). Idene is definitely walking her talk these days as she works full-time and pursues a Bachelor's Degree in Business Administration at Columbia College (where she is on the Dean's List). We are all proud of Idene's accomplishments and even prouder to have her on the Abacus Team!

Payroll Protection Plan Loan Forgiveness

If you are one of the five million small businesses who received a PPP loan, now is the time to begin the application process for loan forgiveness. To supplement the [application process](#)

information from the Small Business Administration, Abacus's Chief Planning Officer, [Alex Chastain](#), created this [outline](#) of key issues to consider.



Athena's Corner: Timeless Lessons on Wealth, Greed, and Happiness

[Morgan Housel](#) brings his signature storytelling style to this wisdom-filled [book](#) about what happens in your head when you are making financial decisions. If you think you might have a New Year's resolution related to money, this book is a must read (and makes a great stocking stuffer).