

The scent of spring hangs in the air. With it comes the urge to rejuvenate, refresh, and revive.

And with all your tax paperwork collected and safely in the hands of your trustworthy accountant, it begs the question, now what? What shall you do with your new-found free time and the euphoria that accompanies the onset of spring?

While we work on your taxes, here are some suggestions of things you can work on.

Let's start with a simple counting exercise

You're already good at counting. You count your money. You have a running tally of your worries, problems, and everything that can go wrong in your life at any given moment.

Let's try a different kind of count. Try counting your blessings. What are you grateful for? Count them out – one by one. Keep that tally running throughout your day.

Analyze your life income statement

Evaluate your revenue sources. What comes in daily that energizes you, that motivates and inspires you, that makes you laugh, that makes you happy and fulfilled, and drives you?

Then take a hard look at your expenses. What comes in daily that drains you, that decharges your batteries, that brings you down, worries you, and pushes you back?

At the end of each day, do your revenues exceed your expenses? Are you running on a daily net income or net loss? Take a look at the months, then the years. Have you accumulated a surplus or a deficit?

Prepare a forecast aimed at improving your daily bottom line. How can you maximize that which energizes you and minimize that which drains you?

Invest in a new life insurance product

Most life insurance policies take care of your family in the unfortunate event of your death. There is one policy on the market that takes care of you while you live.

Exercise.

The cost is a daily premium of 30 minutes of activity that elevates your heart rate. The policy can be as flexible as you are. The coverage is comprehensive and it offers lifetime protection. This is the only life insurance policy available where the insured is the beneficiary!

Draft a will

Exercise is one side of the coin. The other – healthy eating! How can you hold yourself

back from eating that entire bag of tortilla chips? It's not in a pill or a program. It's in you, and it's called willpower.

Start with eating less in general. Then eat less specifically, by eating less unhealthy food. Continue by increasing your healthy food choices. Take small steps. Enjoy the success that comes with each small turn of your will, and watch how quickly this snowballs into a complete turnaround to a healthy eating lifestyle.

Consider PRE-retirement planning

Make a bucket list. One hundred things you want to do before you die. Hold yourself accountable for action. Share the list with your family and friends. You may be surprised to find out that you will have company for some items. Attach a timeline to the list. Do at least one thing a year.

Get out of that tax shelter

Get out of your house. Circulate. Meet new people. Breathe some fresh air. Walk through your neighbourhood. Visit a wine bar. Stroll through Westboro. Bike along the canal. Paddle the Ottawa River. Visit your local bakery. Sit in a coffee shop and observe life from a distance.

Become a regular somewhere, other than your home.

Establish family trust

Explore your feelings about trust. Do you trust yourself, your family, your friends? Do you trust people? Do you trust life?

Do you trust enough that you could quit an unfulfilling job or an uninspired relationship and know that life will bring you something even better? Or do you hang onto the illusion of control to gain temporary comfort and safety? What price are you paying for your distrust in life? Try taking a leap and trust that the universe has got your back. Trust the process.

Consider income splitting

With a complete stranger. Buy a coffee for the next person in line behind you. Donate to a local cause. Sponsor a child in a developing country. A funny thing happens when you give instead of get, you just keep getting.

Conduct a fair market valuation of your relationships

Are you sitting on some significant unrealized gains? Are there people in your life who are underappreciated? Who is there for you, rain or shine, without question or judgement? Why not take them out to lunch? Or to Paris? Or send them some flowers?

Are you carrying some unrealized losses? Are there people in your life right now who are toxic to you, who take more than they give,

who judge you or hold you back from being your best self? Why not let them know, or step away and distance yourself from them?

It's time to cash in your unrealized gains and cash out your unrealized losses.

Reconsider your investment strategy

Revisit your investment portfolio. Where have you chosen to invest your energy and time? Are these investments well placed? How are they working out for you? What dividends do you reap? Do you have an equitable split between family, friends, yourself, and your work? And within the investment that is yourself, do you have a balanced portfolio of mind, body, and spirit?

Borrow to invest

Borrow some time from your day today to invest in a relationship for tomorrow. Spend some quality time with a loved one, a dear friend, or a valued colleague. Go for a walk with a colleague. Play a board game with a friend. Do a puzzle with your life partner. Play soccer with your child.

The conversations and shared experiences that grow out of these interactions nurture connections and bonds that last a lifetime. The true richness of the human experience lies in our connections with each other.

"Life is not a journey to the grave with the intention of arriving safely in a pretty and well-preserved body. But rather, to skid in broadside, thoroughly used up, totally worn out, and loudly proclaiming WOW what a ride."

– Mark Frost

This and That

Logan Katz would like to thank Anthony Poon, Mary Le, Rachel McDonald, Siyuan Fu and Kyle Royer, students of the University of Ottawa and Carleton University co-operative programs, who will be completing their first co-op term with us at the end of this month. Their hard work and efforts have been much appreciated.

Logan Katz was pleased to sponsor the award for small business – the "micro" business of the year at the 2014 Gala de l'excellence du Le Regroupement des gens d'affaires de la Capitale nationale (RGA). Denis Chainé announced the winner of this award at the Gala, held on April 14, 2014. Congratulations to CLA Personnel!

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