

# THE BEFIT BRIEF



## The Tax Deadline is Around the Corner! Avoid These Mistakes:

Tax season can be overwhelming, especially for busy healthcare professionals like you!

Avoid these common pitfalls:

- Missing deductions
- Filing too late (or too early)
- Overlooking retirement contributions
- Not reporting all your income
- Incorrect information

Check out our latest blog on how you can avoid making these mistakes & how we can help!

[Visit Our Website To Learn More!](#)



March is Credit Education Month! Visit our Instagram for our 3 part credit education series. @bffcu





Don't Forget About Our Giveaway!

Details on our Instagram  
**@bffcu**



## TPMG Loans Available for Kaiser Physicians!

Have you recently been promoted to Senior  
Physician at Kaiser Permanente?

Our TPMG loan is designed to help you  
purchase your shares and invest in your  
future.

Give us a call for details.  
707-557-8900



## The 50/30/20 Rule!



### A Simple Budget for Healthcare Professionals

50% Needs – Rent/mortgage, utilities,  
groceries, insurance.

30% Wants – Dining out, shopping,  
entertainment.

20% Savings & Debt – Emergency fund,  
retirement, paying off loans.