

# How do I review my data at the end of the year?

Reports and graphs are excellent tools for conducting a year-end review of your finances. Cash flow reports, summary reports, net worth reports and graphs, tax summary and Tax Schedule reports, Capital Gains reports—these can give you all the information you need to see where you stand at the end of the year.

You can use the information from your year-end review to review and fine-tune your [life event plans](#), as well.

To get an idea of your financial picture over the last year:

- Create a summary report for the year with column headings set to the time period you prefer (for example, Month or Quarter) to see how activity varies from one period to another.
- Create a Cash Flow report for the year to review how funds have moved in and out of categories and asset or loan accounts.
- Create a spending report for the year to review spending trends by payee or category.
- Create a net worth report with columns for the intervals you want to examine to see changes in your net worth.