

CLIENT SERVICE CALENDAR

We're committed to providing a consistent, reliable, and thorough client experience throughout the course of the year. While all relevant topics are discussed and reviewed during the initial financial planning process and as necessary throughout our relationship, this calendar will provide a rough guideline to our ongoing service.

January		February		March	
Monthly Newsletter		Monthly Newsletter		Monthly Newsletter	
Internal Investment Review		Internal Investment Review		Internal Investment Review	
Rebalance 401(k) and Investment Accounts					
		Review IRA Contributions			
		Cash Flow & Debt Review			
		Stock Options Review			
April		May		June	
Monthly Newsletter		Monthly Newsletter		Monthly Newsletter	
Internal Investment Review		Internal Investment Review		Internal Investment Review	
		Annual Credit Check			
		Insurance/Estate Review			
July		August		September	
Monthly Newsletter		Monthly Newsletter		Monthly Newsletter	
Internal Investment Review		Internal Investment Review		Internal Investment Review	
Rebalance 401(k) and Investment Accounts					
		Industry Compensation Comparison			
		Mid Year Cash Flow Review			
October		November		December	
Monthly Newsletter		Monthly Newsletter		Monthly Newsletter	
Internal Investment Review		Internal Investment Review		Internal Investment Review	
		Charitable Contribution Review			
		Employee Benefits Review			
		401(k) Election Review			
		Roth IRA Conversions			
Legend:					
Educational Material					
Investments					
Financial Planning					

