MILLENNIAL WEALTH

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		
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