MILLENNIAL WEALTH

CLIENT SERVICE CALENDAR

We're committed to providing a consistent, reliable, and thorough client experience throughout the course of the year. Scheduled, semi-annual meetings will occur to discuss relevant topics, although the number of meetings we have may be greater. This calendar provides a rough guideline of potentially relevant topics and services we'll perform. Each client is unique, and we'll cater our services to ensure we're covering everything relevant to you!

January	February	March	
Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Meeting #1
Internal Investment Review	Internal Investment Review	Internal Investment Review	
Rebalance 401(k) and Investment Accounts	Gather Tax Documents		
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	
File Tax Returns	Review Completed Tax Return & Update W-4		
Annual Credit Check			
July	**August**	**September**	
Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Meeting #2
Internal Investment Review	Internal Investment Review	Internal Investment Review	
Rebalance 401(k) and Investment Accounts			
Insurance/Estate Review			
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:

Legend
Educational Material
Investments
Financial Planning