MILLENNIALWEALTH

CLIENT SERVICE CALENDAR

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

Comprehensive Meeting 1
January → June
Recurring:
Monthly Newsletter
Monthly Internal Investment Review
Quarterly Investment Performance Update Email
Covered Topics:
Equity Compensation Review
Review IRA Contributions
Cash Flow & Debt Review
Gather Tax Documents
File Tax Returns
Review Completed Tax Return & Update W-4
Annual Credit Check
Comprehensive Meeting 2
July → December
Recurring:
Monthly Newsletter
Monthly Internal Investment Review
Quarterly Investment Performance Update Email
Covered Topics:
Insurance/Estate Review
Mid Year Cash Flow Review
Charitable Contributions Review
Employee Benefits Review
401(k) Election Review
Roth IRA Conversions

Legend:
Educational Material
Investments
Financial Planning