MILLENNIAL WEALTH

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 client 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!

First Review Meeting	
March →	**April**
Recurring:	
Monthly Newsletter	
Monthly Internal Investment Review	
Covered Topics:	
Cash Flow & Debt Review	
Review Asset Allocation	
Review IRA Contributions	
Equity Compensation Review	
Review Employer Retirement Contributions	
Review Tax Return & Update W-4 (if applicable)	
Review Economic/Market Environment & Portfolio Performance	
Second Review Meeting	
September →	**October**
Reccuring:	
Monthly Newsletter	
Monthly Internal Investment Review	
Covered Topics:	
Cash Flow & Debt Review	
Annual Credit Check	
Unclaimed Property Search	
Review Long-Term Financial Plan	
Review Insurance & Estate Planning	
Review Open Enrollment & Employee Benefits	
End of the Year Tax Withholding Projection	