MILLENNIAL WEALTH

CLIENT SERVICE CALENDAR

We're committed to providing a consistent, reliable, and thorough client experience throughout the year. We'll conduct comprehensive semi-annual progress meetings to discuss relevant topics but may have additional meetings throughout the year as client situations warrant. This calendar provides a rough guideline of topics we'll discuss and services we'll perform. Each client is unique, and we'll tailor our services and meetings to your situation.

Legend:
Education
Investments
Taxes
Client Meetings & Financial Planning

January	February	March	April	May	June
Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter
Internal Investment Review	Internal Investment Review	Internal Investment Review	Internal Investment Review	Internal Investment Review	Internal Investment Review
Estimated Tax Payments		Tax Filing	Tax Filing		Estimated Tax Payments
			Estimated Tax Payments		
			Semi Annual Progress Meeting: • Financial Goals Update • Cash Flow Review • IRA & Roth IRA Contributions • Equity Compensation Review • Employer Retirement Plan Contributions • Tax Return & Withholding Review • Investment Portfolio Review		

July	August	September	October	November	December
Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter
Internal Investment Review	Internal Investment Review	Internal Investment Review	Internal Investment Review	Internal Investment Review	Internal Investment Review
One Page Financial Plan Update		Estimated Tax Payments	**Semi Annual Progress Meeting:** • Cash Flow Review • Financial Independence Review • Insurance Review • Estate Plan Review • Employee Benefits Review • Tax Withholding Review • Roth Conversions • Charitable Contributions		Required Minimum Distribution

FINANCIAL PLANNING FOR YOUR FUTURE, FOR YOUR EXPERIENCES, FOR YOUR LIFE