



## Annual Client Service & Communications Calendar

*[Example - each family will receive a custom calendar]*

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
Review Prior Year Goals & Action Items <i>Look Back</i>	Salary Benchmark	Life & Disability Insurance	Check Credit Score <i>Equifax</i>	Student Loan & Consumer Debt Assessment	Property & Casualty Insurance
Update Goals & Financial Planning Projections <i>Look Forward</i>	Gather Tax Documents <i>1099s Released</i>	401(k) Deferral Review	File Tax Return	Review W-4 <i>Update Withholding</i>	Budget & Cash Flow
Rebalance 529 Plans	Schedule Appointment w/ CPA	Review 401(k) Fund Menu	Qualified Retirement Account Contributions <i>IRA, Roth IRA, SEP</i>	Upload Completed Tax Return <i>Federal, State, Schedules, Vouchers</i>	Quarterly Tax Projections & Estimated Tax Payments <i>June 15th</i>
Quarterly Projections & Estimated Tax Payments <i>January 15th</i>	<b>Meeting #1</b>	Educational Webinar <i>Investments/ Tax</i>	Quarterly Projections & Estimated Tax Payments <i>April 15th</i>	<b>Meeting #2</b>	Client Appreciation Event
Rebalance 401(k) & Investment Accounts			Rebalance 401K & Investment Accounts		
RECURRING					
Monthly Cash Sweep	Monthly Cash Sweep	Monthly Cash Sweep	Monthly Cash Sweep	Monthly Cash Sweep	Monthly Cash Sweep
Firm Newsletter <i>Quarterly Market Update</i>	Firm Newsletter <i>Blog or Podcast</i>	Firm Newsletter	Firm Newsletter <i>Quarterly Market Update</i>	Firm Newsletter <i>Blog or Podcast</i>	Firm Newsletter
Email Clients <i>Monthly Summary</i>	Email Clients <i>Monthly Summary</i>	Email Clients <i>Monthly Summary</i>	Email Clients <i>Monthly Summary</i>	Email Clients <i>Monthly Summary</i>	Email Clients <i>Monthly Summary</i>
Review Investments	Review Investments	Review Investments	Review Investments	Review Investments	Review Investments
JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Rebalance 529 Plans	Check Credit Score <i>TransUnion</i>	Quarterly Tax Projections & Estimated Tax Payments <i>September 15th</i>	Employee Benefits Review <i>Open Enrollment</i>	Use it or Lose it FSA	Check Credit Score <i>Experian</i>
Mortgage Analysis / Homebuyer Education	Estate Review <i>Beneficiaries, Will, AMD, POA</i>	Roth Conversion & Rollover Opportunities	FAFSA Student Aid Deadlines	Budget & Cash Flow	Emergency Reserves Update <i>Savings Account APRs</i>
Rebalance 401(k) & Investment Accounts	Career Development	Capital Gain and Loss Harvesting	Extension Filing Deadline	Mutual Fund Distributions	End-Of-Year Tax Planning Review
Educational Webinar <i>Financial Planning</i>	<b>Meeting #3</b>	Client Appreciation Event	Rebalance 401(k) & Investment Accounts	<b>Meeting #4</b>	Charitable Giving <i>Cash, Stock or Payroll</i>
RECURRING					
Monthly Cash Sweep	Monthly Cash Sweep	Monthly Cash Sweep	Monthly Cash Sweep	Monthly Cash Sweep	Monthly Cash Sweep
Firm Newsletter <i>Quarterly Market Update</i>	Firm Newsletter <i>Blog or Podcast</i>	Firm Newsletter	Firm Newsletter <i>Quarterly Market Update</i>	Firm Newsletter <i>Blog or Podcast</i>	Firm Newsletter
Email Clients <i>Monthly Summary</i>	Email Clients <i>Monthly Summary</i>	Email Clients <i>Monthly Summary</i>	Email Clients <i>Monthly Summary</i>	Email Clients <i>Monthly Summary</i>	Email Clients <i>Monthly Summary</i>
Review Investments	Review Investments	Review Investments	Review Investments	Review Investments	Review Investments

LEGEND	Financial Planning	Income Tax Planning	Investment Planning	Event/ Education	Meeting/ Contact
--------	--------------------	---------------------	---------------------	------------------	------------------