

Title	Topics	Action Steps
<u>Q1 Meeting</u>	Net Worth & Liquidity Check Preparing for Tax Season Prior Year Investment Review	In January or February, we'll review your prior year and plan for changes that are coming up, including cash flow adjustments, goals review, and tax season.
<u>Mid-Year Meeting</u>	Cash Flow & Budget Review Estate, Insurance, Real Estate, Career Review Life Planning & Goals Check-In	Mid-year, we'll review cash flow and personalized topics that are important to your household, such as estate planning, insurance, real estate, career, benefits, etc.
<u>Q4 Meeting</u>	End of Year Cash Flow Tax Planning Charitable Giving	We will review your YTD income, tax withholdings, and determine any EOY tax & cash flow strategies that will optimize your financial plan.

Once clients have been with Real Estate Wealth Planning for about 18 months - 2 years, we will enter a normalized meeting cadence of approximately 3-4 meetings per year. In Q1, we focus on your prior year investments, getting ready for tax season and reviewing your goals. Mid-year, we will review cash flow and topics that are of importance to your household, and in Q4 we will focus on end of year cash flow and tax planning.