Annual Client Service & Communications Calendar

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
Update Goals & Financial Planning Projections *Look Forward*	401(k) Deferral Review	Life & Disability Insurance	Qualified Retirement Account Contributions *IRA, Roth IRA, SEP*	Student Loan & Consumer Debt Assessment	Property & Casualty Insurance
Rebalance 529 Plans	Review 401(k) & HSA Fund Menu		Quarterly Projections & Estimated Tax Payments *April 15th*	Review W-4 *Update Withholding*	Budget & Cash Flow
Rebalance 401(k)	Review and Download Social Security Statement			Upload Completed Tax Return *Federal, State, Schedules, Vouchers*	Quarterly Tax Projections & Estimated Tax Payments *June 15th*
Rebalance HSA				Check In Call	
Quarterly Projections & Estimated Tax Payments *January 15th*					
RECURRING					
Investment Management	Investment Management	Investment Management	Investment Management	Investment Management	Investment Management
Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*

JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Rebalance 529 Plans	Estate Review *Beneficiaries, Will, AMD, POA*	Quarterly Tax Projections & Estimated Tax Payments *September 15th*	Employee Benefits Review *Open Enrollment*	Use it or Lose it FSA	Emergency Reserve Update
Mortgage Analysis. Rent vs Buy Analysis.s	Review Trusted Contact	Capital Gain and Loss Harvesting	FAFSA Student Aid Deadlines	Budget & Cash Flow/ RMD	Review Prior Year Goals & Action Items *Look Back*
Rebalance 401(k)				Roth Conversion & Rollover Opportunities	End-Of-Year Tax Planning Review
					Charitable Giving *Cash, Stock or Payroll*
				Annual Meeting	
Investment Management	Investment Management	Investment Management	Investment Management	Investment Management	Investment Management
Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*

LEGEND	Financial Planning	Income Tax Planning	Investment Planning	Meeting/ Contact