Our *Client Service* Calendar

HYPERION FINANCIAL
ROOTED IN YOUR SUCCESS

JANUARY - JUNE

- Financial Plan review (Update goals, action items, and projections)
- Balance sheet update (includes budget + debt review)
- Credit Score check
- Download and review social security statement
- Weekly Newsletter
- Investments Review
- Rebalance 401k + Investment accounts (includes 529 + HSA)
- Quarterly Market commentary
- Insurance Policy review/check-in (P&C, Health, Life, DI, LTC)
- IRA +HSA contribution check in
- Tax return review
- Review tax withholdings and adjust w4

JULY - DECEMBER

- Goal progress update
- Financial Aid applications/FAFSA
- Recertify student loans
- Review Credit Cards for optimal bonuses/rewards
- Client education/appreciation event
- Open enrollment (Employer + Medicare)
- Weekly newsletter
- Rebalance 401k + Investment accounts (includes 529 + HSA)
- Quarterly Market commentary
- Mid year cash flow check in
- Estate plan review/check-in (update beneficiaries)
- EOY Tax planning review + projections

Cash Flow Planning	Investment Management	Risk Management	Tax Planning	Financial Planning	Estate Planning

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