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WEALTH MANAGEMENT

CLIENT SERVICES CALENDAR

January	February	March	April	May	June
Update Net Worth Statement	Update Cash Flow/Safe Withdrawal Rate	Review Prior Year Contributions	Tax Preparation	Retirement/Financial Independence Reviews	Retirement/Financial Independence Reviews
Update Risk Tolerance	Required Minimum Distributions	Non-Managed Investment Recommendations*	Estimated Tax Payment Review (Due April 18)	Social Security Timing*	Estimated Tax Payment Review (Due June 15)
2022 4Q Estimated Tax Payment Review (Due January 15)	Plan Qualified Charitable Distributions*	Tax Preparation	Review Tax Loss Harvesting Opportunities	Medicare Reviews*	Property & Casualty Insurance Review
Portfolio Cash Review	Portfolio Cash Review	Portfolio Cash Review	Portfolio Cash Review	Portfolio Cash Review	Portfolio Cash Review
Investment Review & Rebalance	Investment Review & Rebalance	Investment Review & Rebalance	Investment Review & Rebalance	Investment Review & Rebalance	Investment Review & Rebalance

July	August	September	October	November	December
Retirement/Financial Independence Reviews	Retirement/Financial Independence Reviews	Retirement/Financial Independence Reviews	Tax Projections	Tax Projections	Required Minimum Distributions
Estate Planning	Life, Disability, LTC Insurance Review	Estimated Tax Payment Review (Due September 15)	Roth Conversions	Roth Conversions	Qualified Charitable Distributions
Beneficiary Reviews	Review Tax Loss Harvesting Opportunities	College Funding Planning	Open Enrollment – HSA Contributions – 529 Contributions – Health Insurance	End of Year Portfolio Review for Tax Planning	Retirement Savings Contributions
Portfolio Cash Review	Portfolio Cash Review	Portfolio Cash Review	Portfolio Cash Review	Portfolio Cash Review	Portfolio Cash Review
Investment Review & Rebalance	Investment Review & Rebalance	Investment Review & Rebalance	Investment Review & Rebalance	Investment Review & Rebalance	Investment Review & Rebalance

*When applicable