Yearly Service Calendar

A holistic approach to managing your financial well-being throughout the year

Winter : Tax Letters Sent out

During the winter months, we send out a personal Tax Letter Summary to the client or their CPA/Tax Preparer, outlining all the Tax Planning Tasks we undertook that Tax Year. This letter ensures that the client or their tax preparer has a detailed record of the tax-related actions we have taken on their behalf, helping them avoid missing any important items when filing their taxes.

(Jan- March)

Spring: Meetings - Retirement and Financial Review

Review and update retirement projections

Analyze client's current retirement savings, investment strategies, and projected retirement income to ensure they are on track to meet their goals

Review high-priority financial planning areas

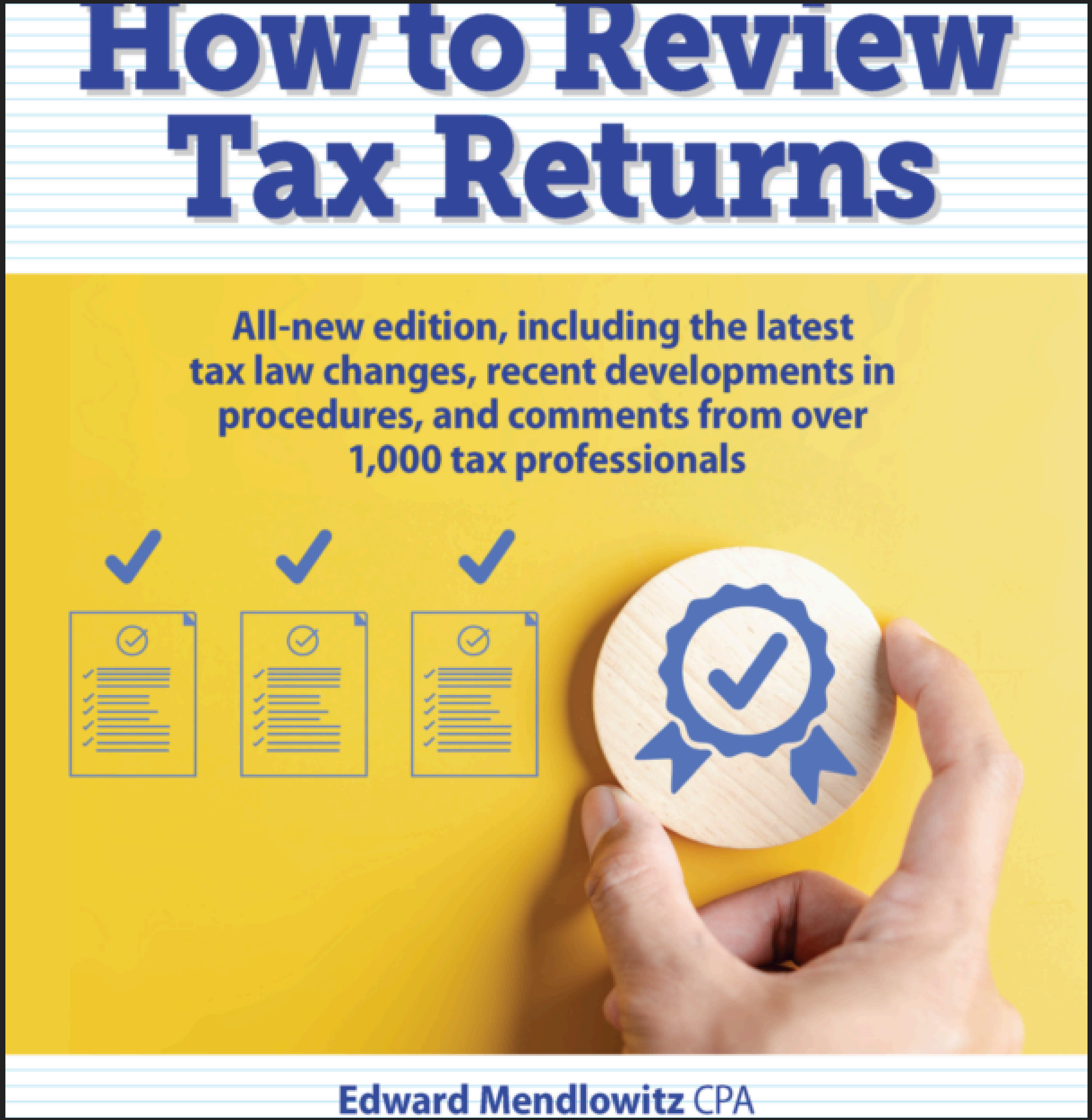
Discuss and address any other pressing financial concerns the client may have, such as healthcare, social security, or cash flow planning

Discuss changes to investment portfolio

For clients with investment management, review any adjustments made to their portfolio and discuss the rationale behind those changes

This spring meeting ensures that the client's retirement planning and other high-priority financial needs are addressed and adjusted as necessary, helping them stay on track to achieve their long-term financial goals.

(April-June)



Summer: Tax Return Review

During the summer months, we proactively reach out to each client to collect and review their tax returns. If a client is interested, we thoroughly comb through their tax returns to identify opportunities to lower their tax exposure and maximize their tax savings.

(July-Sept)

Fall: Client Meetings

Complete Tax Planning Projections & Tasks

Complete any tax planning tasks like Roth conversions or account funding. We

Estate Planning Review

In the Odd Years, we review your estate documents, beneficiaries & trust documents to ensure your estate is up to date.

Insurance Review

In the Even Years, we review your insurance coverage to ensure you have the proper amount of coverage and are not over insured in any areas.

The fall client meeting is a crucial touchpoint to ensure the client's financial plan remains up-to-date and aligned with their evolving needs and goals. This periodic review allows for proactive adjustments to help the client stay on track towards their long-term financial objectives.

(Oct - Dec)