

Annual Financial Planning Calendar

First Quarter (Q1)			Second Quarter (Q2)		
January	February	March	April	May	June
<ul style="list-style-type: none"> Annual Goal Setting and Cash Flow Planning Meeting 401(k)/403(b) plan analysis 	<ul style="list-style-type: none"> Capital Gains Tax Reporting Mortgage Loan Review 	<ul style="list-style-type: none"> Gift and Education Planning Check-In IRA Contribution & Check-In End Q1 Portfolio Strategy Meeting 	<ul style="list-style-type: none"> Tax Meeting with Accountant 	<ul style="list-style-type: none"> Major Purchase Planning 	<ul style="list-style-type: none"> Mid Year Cash Flow Check-In End Q2 Portfolio Strategy Meeting
Third Quarter (Q3)			Fourth Quarter (Q4)		
July	August	September	October	November	December
<ul style="list-style-type: none"> 401(k)/403(b) plan analysis 	<ul style="list-style-type: none"> Estate Planning Strategies Check-In 	<ul style="list-style-type: none"> Employee Benefits Review End Q3 Portfolio Strategy Meeting 	<ul style="list-style-type: none"> Life, Disability, and Long-Term Care Insurance Strategy Meeting 	<ul style="list-style-type: none"> End of Year Tax Planning 	<ul style="list-style-type: none"> Full Financial Plan Evaluation End Q4 Portfolio Strategy Meeting

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