

Annual Financial Planning Calendar

First Quarter

Annual Goal Setting & Cash Flow Planning	Capital Gains Tax Reporting Summary	Gift & Education Planning Check-In
Q1 Strategy & Tactics Meeting	Mortgage Loan and other Debt Review	IRA Contribution Check-In
	Quarterly Educational Event	

Second Quarter

On Going Financial Planning Task Update	Insurance Strategy Review	Mid Year Cash Flow Update
Q2 Strategy & Tactics Meeting	Tax Return Review	
	Quarterly Educational Event	

Third Quarter

Mortgage Loan and other Debt Review	Estate Planning Check-In	On Going Financial Planning Task Update
Q3 Strategy & Tactics Meeting	On Going Financial Planning Task Update	
	Quarterly Educational Event	

Fourth Quarter

Employee Benefits Review	End-Of-Year Tax Planning Review	Full Financial Plan Review
Q4 Strategy & Tactics Meeting	Check Annual Credit Score	
	Quarterly Educational Event	

Legend:

Investments

Financial Planning

Tax Planning

Event/Webinar