Annual Financial Planning Calendar

First Quarter			Second Quarter		
January	**February**	**March**	**April**	**May**	**June**
Annual Goal Setting & Cash Flow Planning	Capital Gains Tax Reporting Summary	Gift & Education Planning Check-In	On Going Financial Planning Task Update	Insurance Strategy Review	Mid Year Cash Flow Update
Q1 Strategy & Tactics Meeting	Mortgage Loan and other Debt Review	IRA Contribution Check-In	Q2 Strategy & Tactics Meeting	Tax Return Review	
Quarterly Educational Event			Quarterly Educational Event		

Third Quarter			Fourth Quarter		
July	**August**	**September**	**October**	**November**	**December**
Mortgage Loan and other Debt Review	Estate Planning Check-In	On Going Financial Planning Task Update	Employee Benefits Review	End-Of-Year Tax Planning Review	Full Financial Plan Review
Q3 Strategy & Tactics Meeting	On Going Financial Planning Task Update	Annual Appreciation Event	Q4 Strategy & Tactics Meeting	Check Annual Credit Score	
Quarterly Educational Event			Quarterly Educational Event		

Legend:	Investments	Financial Planning	Tax Planning	Event/Webinar