

Plan of Care Service Calendar

Cap Gains Review	Q1			Q2		
Cap Gains Reporting Balance Sheet Review Contribution Review Update Financial Plan Ambitions Credit Score Update Update Honthly Monthly Newsletter Q3 July August August September Client Satisfaction Review Review ARISk Assessment Debt Review Liquidity Analysis Tax Withholding Review (W4) Task Review Annual Income Sources Projection Tax Rate Review Savings Rate Review Monthly Monthly Monthly Newsletter Newsletter Newsletter Newsletter November December Net Worth Statement Update Liquidity Find of Year Tax Festate Plan	January	February	March	April	May	June
Plan Ambitions Review Investment Performance and Allocation Review Monthly Newsletter Parformance and Allocation Review Monthly Newsletter Pojection Monthly Newsletter Projection Savings Rate Review Monthly Newsletter Newsletter Newsletter Review Projection Savings Rate Review Monthly Newsletter Newsletter Newsletter Newsletter Projection Savings Rate Review Monthly Newsletter Newsletter Newsletter Newsletter Projection Savings Rate Review Monthly Newsletter Newsletter Newsletter Newsletter Projection Savings Rate Review Newsletter			& IRA Contribution		Risk Assessment	
Credit Score Update Performance and Allocation Review Monthly Newsletter Newsletter Projection Savings Rate Review Monthly Newsletter Newsletter Newsletter Newsletter Newsletter Review Insurance Review Review Beneficiary Tax Allocation Survey Annual Income Sources Projection Savings Rate Review Nonthly Monthly Newsletter Newsletter Newsletter Newsletter Newsletter November New Worth Statement Update End of Year Tax Estate Plan			Task Review			Task Review
Monthly Newsletter New		Performance and Allocation	Sources			
Monthly Newsletter Q3 Q4 July August September October November Insurance Review Review Client Satisfaction Satisfaction Survey Cash Flow & Debt Review Debt Review Open Enrollment Statement Update End of Year Tax Festate Plan						
Q3 Q4	Monthly	Monthly	Monthly		Monthly	Monthly
July August September October November December Insurance Balance Sheet Client Cash Flow & Debt Review Open Enrollment Statement Review Tax Allocation Liquidity Find of Year Tax Estate Plan	Newsletter	Newsletter	Newsletter	Newsletter	Newsletter	Newsletter
Insurance Balance Sheet Satisfaction Review Survey Survey Liquidity Find of Year Tax Estate Plan	Q3			Q4		
Insurance Balance Sheet Satisfaction Review Survey Survey Liquidity End of Year Tax Estate Plan	July	August	September	October	November	December
Beneficiary Tax Allocation Liquidity End of Year Tax Estate Plan			Satisfaction		Open Enrollment	Statement
Review Review Analysis Planning Review	Beneficiary Review		Task Review	Liquidity Analysis	End of Year Tax Planning	Estate Plan Review
Investment Performance and Allocation Review Student Loans Review Tax Rate Review Performance Performance		Performance and Allocation		Tax Rate Review	Investment	Task Review
Savings Rate Review FAFSA				Review FAFSA		
Annlications	Monthly	Manthh	Monthly	Applications	Monthly	Monthly
	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter