

YOUR ANNUAL PLANNING CALENDAR

We will contact you throughout the year to initiate these planning opportunities.
All may not apply to you, but we'll keep track and proactively stay in touch.

January - March



One Page Financial
Plan Updates



Roth Conversion Analysis



Retirement Plan Contributions

April - June



Tax Return & Analysis



Spring Review Meetings



Beneficiary Review &
Summary

July - September



One Page Financial
Plan Updates



Insurance Review
Medicare, Life



Estate Plan Document
Review

October - December



End of Year Tax
Planning Opportunities



Fall Review
Meetings



Required Minimum
Distribution Planning

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Securities & Financial Planning offered through LPL Financial, a registered Investment Advisor, Member FINRA/SIPC

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