



# ANNUAL SERVICE CALENDAR

## WINTER SEASON PLANNING AREAS FOR REVIEW



Tax  
Summary  
Letter



Pay Stubs, Benefits,  
Salary, Expenses,  
Cash Levels



RMD/QCD  
Management and  
Distribution Planning



Roth  
Conversions



Retirement Plan  
Contributions

## SPRING SEASON PLANNING AREAS FOR REVIEW



Tax Return  
Analysis &  
Review



One Page  
Financial Plan  
Updates



Spring Review  
Meetings



Retirement Plan  
Projections &  
Investment  
Presentation



Beneficiary  
Review &  
Summary

## SUMMER SEASON PLANNING AREAS FOR REVIEW



Tax Return Review &  
Preliminary Roth  
Conversion Analysis



One Page  
Financial  
Plan Updates



Insurance Review  
(Medicare, Life (even years),  
LTC and P&C (odd years))



Estate Plan Document  
Review & Flow Chart  
(Gifting, Deathbed  
Planning, Estate Tax Law  
Risk, Charitable Giving)

## FALL SEASON PLANNING AREAS FOR REVIEW



Tax Return  
Analysis &  
Review



End of Year Tax  
Planning Opportunities  
(Tax loss harvesting, capital  
gain offset)



Full Review  
Meetings



Roth Conversion  
& Distribution  
Analysis