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Client Service Calendar

1st Quarter (Jan-Mar)			2nd Quarter (Apr-Jun)		
Quarterly Performance Report/Review	Financial Statements Review	Tax Planning Meeting	Quarterly Performance Report/Review	Update Financial Planning Projections	401(k) Rebalance Meeting
Quarterly Newsletter	Annual Budget Review	Capital Gains Tax Reporting Summary	Quarterly Newsletter		Estate Planning Check-In
Annual Credit Score Check-up			Insurance Policy Check-In		

3rd Quarter (Jul-Sep)			4th Quarter (Oct-Dec)		
Quarterly Performance Report/Review	Employer Benefits Review	Annual Insurance/Estate Review	Quarterly Performance Report/Review	End-Of-Year Tax Planning Meeting	401(k) Election Review
Quarterly Newsletter			Quarterly Newsletter	Update Financial Planning Projections	Salary Benchmarking Review
Mid-Year Budget Review					Client Satisfaction Survey

Legend:	Investment Mtgs	Check-ins	Reporting / Newsletter	Planning Mtgs
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