SILVER STRAND
FINANCIAL PLANNING

Annual Client Service & Communication Calendar

ELEMENTS	HOLISTIC PLANNING	INCOME TAX INFORMATION	INVESTMENT PLANNING	COLLEGE PLANNING	CLIENT TASKS
CLIENT MEETING / CONTACT	COMMUNITY ENGAGEMENT				

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
Burn Rate Review	Savings Rate Review	Debt Rate Review	Savings Rate Review	Tax Rate Review	Qualified Term Review
Employer Plan Contribution Review	Emergency Reserves Update and Savings Account Review	Consumer Debt and Student Loan Assessment	Qualified Retirement Account Contributions: IRA, Roth IRA, SEP	Tax Return Review	Home Buyer Education
Budget & Cash Flow	Insurance Review: Disability	Mortgage Analysis		Budget & Cash Flow	Insurance Review: Long Term Care
	College Planning	Rebalance 529 Plan	Check Credit Report		Check Social Security Report
Quarterly Projections & Estimated Tax Payments January 15	1099's Released Gather Tax Documents and Make XY Tax Solution Appointment	Investment Allocation Review	File Tax Returns, Quarterly Projections & Estimated Tax Payments April 15	Let's Connect Meeting 1 Family Story Update - Where Have Been, What Have You Accomplished, Where Do You Want To Go Next	Quarterly Projections & Estimated Tax Payments June 15
Investment Portfolio Review	Investment Portfolio Review	Investment Portfolio Review	Investment Portfolio Review	Investment Portfolio Review	Investment Portfolio Review
Employer Retirement Account Review / Rebalance	Employer Retirement Account Review / Rebalance	Employer Retirement Account Review / Rebalance	Employer Retirement Account Review / Rebalance	Employer Retirement Account Review / Rebalance	Employer Retirement Account Review / Rebalance
Quarterly Update	SSFP Serves		Quarterly Update	SSFP Serves	

JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Estate Status Review	Equity Rate Review	Liquid Term Review	Total Term Review	Insurance Rate Review	Real Estate Term Review
Estate Document Review: Beneficiaries, Account Titling, POA, HIPAA Forms, AMD	Risk Review / Financial Health Diagnostic	Roth Conversion & Rollover Oportunities	Employee Benefits Review Open Enrollment	Insurance Review: Property and Casualty, Personal Liability	End of Year Tax Planning
Insurance Review: Life Insurance			FAFSA Student Aid Deadlines	Use It or Lose It FSA	Charitable Giving: Stock, Cash, Payroll
	Check Credit Report		Extension Filing Deadline	Required Minimum Distribution Review and QRD	Check Credit Report
		Extension Filing Deadline	Let's Connect Meeting 2 12 x 12 Review and Preview: How Did The Last 12 Months Go? Plans For The Next 12 Months	Capital Gain and Loss Harvesting	Year End Review & New Year Update
Investment Portfolio Review	Investment Portfolio Review	Investment Portfolio Review	Investment Portfolio Review	Investment Portfolio Review	Investment Portfolio Review
Employer Retirement Account Review / Rebalance	Employer Retirement Account Review / Rebalance	Employer Retirement Account Review / Rebalance	Employer Retirement Account Review / Rebalance	Employer Retirement Account Review / Rebalance	Employer Retirement Account Review / Rebalance
Quarterly Update	SSFP Serves		Quarterly Update	SSFP Serves	