Motifplanning

Annual Client Service & Communications Calendar

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
Semi-annual Meeting	Semi-annual Meeting	Estate Review *Beneficiaries, Will, AMD, POA*	File Tax Return	Office Hours	Life & Disability Insurance
Budget & Cashflow	Check Credit Score *Equifax*	Qualified Retirement Account Contributions *Employer Solo 401(k)*	Quarterly Projections & Estimated Tax Payments *April 15th*	Student Loan & Consumer Debt Assessment	Check Credit Score *TransUnion*
Quarterly Projections & Estimated Tax Payments *January 15th*	Schedule Appointment w/ CPA		Qualified Retirement Account Contributions *IRA, Roth IRA, SEP, HSA*	Investment Review	Quarterly Tax Projections & Estimated Tax Payments *June 15th*
RECURRING					
Podcast	*Podcast*	*Podcast*	*Podcast*	*Podcast*	*Podcast*
Blog Post	*Blog Post*	*Blog Post*	*Blog Post*	*Blog Post*	*Blog Post*
Private client newsletter	*Private client newsletter*	*Private client newsletter*	*Private client newsletter*	*Private client newsletter*	*Private client newsletter*

JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Semi-annual Meeting	Semi-annual Meeting	Property & Casualty Insurance	Employee Benefits Review *Open Enrollment*	Office Hours	
Mortgage Analysis / Homebuyer Education		Quarterly Tax Projections & Estimated Tax Payments *September 15th*	Extension Filing Deadline	Tax Planning	
			Check Credit Score *Experian*	Investment Review	
				Rebalance Investment Accounts	
RECURRING					
Podcast	*Podcast*	*Podcast*	*Podcast*	*Podcast*	*Podcast*
Blog Post	*Blog Post*	*Blog Post*	*Blog Post*	*Blog Post*	*Blog Post*
Private client newsletter	*Private client newsletter*	*Private client newsletter*	*Private client newsletter*	*Private client newsletter*	*Private client newsletter*

LEGEND	Financial Planning	Income Tax Planning	Investment Planning	Event / Education	Meeting / Contact