Motifplanning

Annual Client Service & Communications Calendar

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
Budget & Cashflow	Schedule Appointment w/ CPA	Semi-annual Meeting	Semi-annual Meeting	Office Hours	Mid-year check-in
Quarterly Projections & Estimated Tax Payments *January 15th*	529 Plan Review	Qualified Retirement Account Contributions *Employer Solo 401(k)*	File Tax Return or Extension	Check Credit Score *TransUnion*	Life & Disability Insurance
401(k) Savings Review: Adjust contributions			Quarterly Projections & Estimated Tax Payments *April 15th*	Tax return review	Quarterly Tax Projections & Estimated Tax Payments *June 15th*
Check Credit Score *Equifax*			Qualified Retirement Account Contributions *IRA, Roth IRA, SEP, HSA*	Investment Review	Student Loan & Consumer Debt Assessment

ONGOING

Research financial planning strategies and tax legislation changes

Portfolio Review: Tax-loss harvesting, capital gain harvesting and rebalance opportunities

Monthly educational webinars, livestreams, blog posts and private client newsletter

JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Mid-year check-in	Property & Casualty Insurance	Semi-annual Meeting	Semi-annual Meeting	Office Hours	
Mortgage Analysis / Homebuyer Education	Review Goals	Tax Projection Analysis: Charitable giving, Roth conversions, stock vesting and withholding	Employee Benefits Review *Open Enrollment*	Spend FSA before year end	
		Quarterly Tax Projections & Estimated Tax Payments *September 15th*	Extension Filing Deadline	Tax Planning	
		Check Credit Score *Experian*	FAFSA Open Date	Investment Review	
			Estate Review *Beneficiaries, Will, AMD, POA*	Rebalance Investment Accounts	

ONGOING

Research financial planning strategies and tax legislation changes

Portfolio Review: Tax-loss harvesting, capital gain harvesting and rebalance opportunities

Monthly educational webinars, livestreams, blog posts and private client newsletter

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

Schedule will vary based on client need, circumstances, and opportunities identified.