

Months	Client Communications Template	Resources
<b>JANUARY + FEBRUARY</b>	15 Ways to Save More in 2021	What Accounts Should I Consider If I Want To Save More
<b>MARCH + APRIL</b>	It's Time To Review Your Tax Returns	As Someone Who Is Working, What Issues Should I Consider When Reviewing My Tax Return?  As A Retiree, What Issues Should I Consider When Reviewing My Tax Return?
<b>MAY + JUNE</b>	Reviewing Investments	What Issues Should I Consider When Reviewing My Investments?
<b>JULY + AUGUST</b>	Reviewing An Estate Plan	What Issues Should I Consider Before I Update My Estate Plan?
<b>SEPTEMBER + OCTOBER</b>	Reviewing Insurance Coverage	What Issues Should I Consider When Reviewing My Property & Casualty Insurance Policies?  What Issues Should I Consider When Reviewing My Health & Life Insurance Policies?
<b>NOVEMBER + DECEMBER</b>	Reviewing End Of Year Planning Opportunities	What Issues Should I Consider Before The End Of The Year?