

	COMMUNICATIONS TEMPLATE	GUIDES	COMMUNICATIONS TEMPLATE	GUIDES
JANUARY & FEBRUARY	15 Ways To Save More in 2022	What Accounts Should I Consider If I Want To Save More?	Start The Year On The Right Foot	What Issues Should I Consider At The Start Of The Year?
MARCH & APRIL	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?	Cash Flow Check Up	What Issues Should I Consider When Reviewing Cash Flow?
MAY & JUNE	Reviewing Investments	What Issues Should I Consider When Reviewing My Investments?	Master List Of Goals	Master List Of Goals
JULY & AUGUST	Reviewing An Estate Plan	What Issues Should I Consider Before I Update My Estate Plan?	Estate Document Review	What Issues Should I Consider When Reviewing My Estate Planning Documents?
SEPTEMBER & OCTOBER	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?	Open Enrollment	Should I Change My Medicare Coverage?
NOVEMBER & DECEMBER	Reviewing End Of Year Planning Opportunities	What Issues Should I Consider Before The End Of The Year?	Planning for Strategic Charitable Giving	Should I Use A Donor Advised Fund (DAF) When Giving To Public Charities?