Client Service Calendar

ABC Financial

Title	Topics	Action Steps
1st Quarter (Jan-March)	Start The Year On The Right Foot It's Time To Review Your Tax Returns	Annual limits change every year and new legislation usually goes into effect at the start of the year. As such, we begin the year by reviewing critical planning items.
2nd Quarter (April-June)	Cash Flow Check Up Reviewing Investments	In the second quarter, we'll focus on reviewing cash flow and investments. These two strategies often overlap and it is imperative that they be reviewed annually.
3rd Quarter (July-Sept)	Insurance Review (Odd Years) Estate Planning Review (Even Years)	Alternating each year, we will cover 20-30 planning issues for insurance and Estate planning depending on the year.
4th Quarter (Oct-Dec)	Reviewing End Of Year Planning Opportunities	Starting in early October, we will begin to do end-of-year planning to make sure that we have addressed time-sensitive planning opportunities.

About ABC Financial:
At ABC Financial, we work with you throughout the year to ensure you are on track to reaching your goals. Each quarter, we have a specific area in your financial life that we will review.

To schedule a meeting, please click here.

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January and February	Review Ways To Save More RMD Management Review
March and April	Tax Return Review Cash Flow Check Up
May and June	Estate Document Review Employee Benefit Review
July and August	Reviewing Investments Beneficiary Review
September and October	Reviewing Insurance Coverage Open Enrollment Options Review
November and December	End Of Year Planning Capital Loss Planning

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