

|           | Communication Template                       | Guides                                                                                 |
|-----------|----------------------------------------------|----------------------------------------------------------------------------------------|
| Jan + Feb | Start The Year On The Right Foot             | What Issues Should I Consider At The Start Of The Year?                                |
|           |                                              | What Documents Do I Need To Collect For Filing My Tax Return?                          |
|           | RMD Management For The Year                  | What Issues Should I Consider When Reviewing My RMD?                                   |
| Mar + Apr | 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 + Jun | 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?             |
|           | Beneficiary Review                           | What Issues Should I Consider When Reviewing My Beneficiaries?                         |
| Jul + Aug | Reviewing Investments                        | What Issues Should I Consider When Reviewing My Investments?                           |
|           |                                              | What Issues Should I Consider When Establishing & Maintaining My Emergency Fund?       |
|           | Goals Assessment                             | Master List Of Goals                                                                   |
| Sep + Oct | Reviewing Insurance Coverage                 | What Issues Should I Consider When Reviewing My Health & Life Insurance Policies?      |
|           | Open Enrollment                              | Should I Change My Medicare Coverage During Open Enrollment?                           |
|           | Employee Benefit Review                      | What Issues Should I Consider With My Employer-Provided Benefits?                      |
| Nov + Dec | 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?               |
|           | Capital Loss Planning                        | What Issues Should I Consider When Harvesting Capital Losses?                          |