

	Communication Template	Guides
Jan + Feb	Start The Year On The Right Foot	What Issues Should I Consider At The Start Of The Year?
	Tax Return Document Preparation	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?
	Review Savings Allocations	Where Should My Next Dollar Go?
May + Jun	Updating 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?
	Reviewing Your Emergency Fund	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	What Issues Should I Consider When Establishing My Charitable Giving Strategies?
	Non-Qualified Portfolio Tax Issues	What Issues Should I Consider With The Income From My Taxable Non-Qualified Account(s)?