Annual Client Service & Communications Calendar*

Topics are suggestions and can be changed based on client need.

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
Review W-4 *Update Withholding*	**Winter Meeting #1**	Download and Review Credit Reports	Rebalance/Review Retirement Accounts (Statements)	**Spring Meeting #2**	Quarterly Tax Projections & Estimated Tax Payments *June 15th*
Quarterly Estimated Tax Payments *January 15th*	Gather Tax Documents *1099s Released*		File Tax Return	Upload Completed Tax Return *Federal, State, Schedules, Vouchers*	Retirement/Investment Education Topic
Rebalance/Review Retirement Accounts (Statements)	Schedule Appointment w/ CPA, if applicable		Quarterly Estimated Tax Payments *April 15th*	401k Deferral and Fund Review	
			Qualified Retirement Account Contributions *IRA, Roth IRA, SEP*		
RECURRING					
Blog *Webinar*	*Blog* *Webinar*	*Blog* *Firm Newsletter* *Webinar*	*Blog* *Webinar*	*Blog* *Webinar*	*Blog* *Firm Newsletter* *Webinar*

JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Celebrate Accomplishments *Review Goals*	**Summer Meeting #3**	Quarterly Estimated Tax Payments *September 15th*	Employee Benefits Review *Open Enrollment*	**Fall Meeting #4**	Property & Casualty Insurance
Rebalance/Review Retirement Accounts (Statements)	Estate Review *Beneficiaries, Will, POA*		FAFSA *Student Aid Deadlines*	Use it or Lose it FSA	End-Of-Year Tax Planning Review
Open Dialogue	Budget & Cash Flow		Extension Filing Deadline	Life & Disability Insurance	Charitable Giving
			Rebalance/Review Retirement Accounts (Statements)	Holiday Budget/Planning	Client Appreciation
RECURRING					
Blog *Webinar*	*Blog* *Webinar*	*Blog* *Firm Newsletter* *Webinar*	*Blog* *Webinar*	*Blog* *Webinar*	*Blog* *Firm Newsletter* *Webinar*

LEGEND	Financial Planning	Income Tax Planning	Investment Planning	Event/ Education	Meeting/ Contact