Annual Client Service & Communications Calendar

Lifestyle Financial Services, LLC

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
Review Prior Year Goals & Action Items *Look Back*	Career Development & Salary Benchmark	Insurance Reviews P & C, Life, Disability, LTC	Annual Credit Score	Emergency Fund Review	Student Loan & Consumer Debt Assessment
Update Goals & Financial Planning Projections *Look Forward*	Gather Tax Documents *1099s Released*	Annual Savings & Investment Review	File Tax Return	Social Security & Medicare Review	Budget & Cash Flow
401(k) Deferral Review	Schedule Appointment Tax Professional	Review 401K Fund Menu	Qualified Retirement Account Contributions *IRA, Roth IRA, SEP*	Upload Completed Tax Return *Federal, State, Schedules, Vouchers*	Quarterly Tax Projections & Estimated Tax Payments *June 15th*
Review W-4 *Update Withholding*	*Meeting #1 In-Person or Virtual*	Educational Webinar *Investments/ Tax*	Quarterly Projections & Estimated Tax Payments *April 15th*	*Meeting #2 In-Person or Virtual*	Educational Webinar *Investments/ Tax*
Rebalance 401(k) & Investment Accounts	Inheritance Planning	Review all Tax Documents	Investment Planning	Is a Living Trust Right for You?	Investment Review/Adjustments
RECURRING					
Firm Newsletter *Market Update*	Firm Newsletter *Market Update*	Firm Newsletter *Market Update*	Firm Newsletter *Market Update*	Firm Newsletter *Market Update*	Firm Newsletter *Market Update*
Monthly Investment Summary	*Monthly Investment Summary*	*Monthly Investment Summary*	*Monthly Investment Summary*	*Monthly Investment Summary*	*Monthly Investment Summary*
Investment Committee Meeting	Investment Committee Meeting	Investment Committee Meeting	Investment Committee Meeting	Investment Committee Meeting	Investment Committee Meeting

JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Rebalance 529 Plans	Review Savings & Investing Goals	Estate Review *Beneficiaries, Will, AMD, POA*	Employee Benefits Review *Open Enrollment*	Calculate RMDs	Distribute RMDs
Mortgage Analysis / Homebuyer Education	Update Financial Plan	Roth Conversion & Rollover Opportunities	FAFSA Student Aid Deadlines	Budget & Cash Flow	Emergency Reserves Update *Savings Account APRs*
Rebalance 401(k) & Investment Accounts	Career Development	Capital Gain and Loss Harvesting	Extension Filing Deadline	Mutual Fund Distributions	End-Of-Year Tax Planning Review
Educational Webinar *Financial Planning*	*Meeting #3 In-Person or Virtual*	Educational Webinar *Financial Planning*	Review Giving Program	*Meeting #4 In-Person or Virtual*	Charitable Giving *Cash, Stock or Payroll*
RECURRING					
Firm Newsletter *Market Update*	Firm Newsletter *Market Update*	Firm Newsletter *Market Update*	Firm Newsletter *Market Update*	Firm Newsletter *Market Update*	Firm Newsletter *Market Update*
Monthly Investment Summary	*Monthly Investment Summary*	*Monthly Investment Summary*	*Monthly Investment Summary*	*Monthly Investment Summary*	*Monthly Investment Summary*
Investment Committee Meeting	Investment Committee Meeting	Investment Committee Meeting	Investment Committee Meeting	Investment Committee Meeting	Investment Committee Meeting

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