



Client Service Calendar

Winter Meeting (January 7 - February 21)

Freedom Wheel Review
Tax Prep Letter
Annual Performance Review
Guardrails Check Up
RMD Planning
ROTH Conversion Planning

Spring Meeting (May 1 - June 14)

Purpose Wheel Review
Annual Tax Report
Guardrails Check Up
Asset Location Review
Income Location Review
Document Storage Check

Fall Meeting (September 24 - November 7)

Protection Wheel Review
Tax Loss Management
Capital Gains Harvesting
ROTH Conversion Execution
Financial Plan Review