Next Mission Financial Planning
Notional Annual Client Service Calendar

January	February	March	April	May	June
Rebalance 401(k) & Investment Accounts	Capital Gains Tax Reporting Summary	Semi-Annual Client Meeting		Insurance Policy Review/Check-In	Monthly Newsletter
Annual Budgeting & Debt Review	Monthly Newsletter	Update College & Retirement Projections	Monthly Newsletter	Monthly Newsletter	Client Appreciation Event
Check Annual Credit Score	Educational Webinar	IRA Contribution Check-In			
Monthly Newsletter		Monthly Newsletter			

July	August	September	October	November	December
Mid-Year Cash Flow Check-In	Monthly Newsletter	Semi-Annual Client Meeting		End-Of-Year Tax Planning Review	Employee Benefits Review
Rebalance 401(k) & Investment Accounts	Educational Webinar	Estate Planning Check-In	Monthly Newsletter	Monthly Newsletter	401(k) & TSP Election Review
Monthly Newsletter		Monthly Newsletter			Monthly Newsletter

Legend:	Investments	Financial Planning	Reporting / Newsletter	Client Webinar/Event	Meeting