



## Service Calendar

Q1: Jan-Mar	Q2: Apr-Jun
Savings Rate Review	Semi-Annual Meeting
Tax Prep Letter	Investment Review
Liquidity Review	Retirement Review
Quarterly Progress Report	Quarterly Progress Report

Q3: Jul-Sep	Q4: Oct- Dec
Debt Review	Semi-Annual Meeting
Estate Review	Tax Planning and Paystub Review
Insurance Review	Retirement Contribution Review
Quarterly Progress Report	Quarterly Progress Report

<b>Legend:</b>	Meetings	Financial Planning	Progress Reports
----------------	----------	--------------------	------------------