



Baskin Financial Planning Service Calendar

January	February	March	April	May	June
Savings Rate Review	Liquid Term Review and Tax Prep Letter	Estate Status Review	Tax Rate and Return Review	Semi-Annual Meeting and One Page Plan Update	Insurance Rate Review
Quarterly Progress Report			Quarterly Progress Report	Equity Rate Review	
Monthly Check-Ins on Financial Planning Tasks					
Ongoing Monitoring and Responding to Life Events					
Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter

July	August	September	October	November	December
Real Estate Term Review	Debt Rate Review	Burn Rate and Spending Review	Income Rate and Tax Planning Review	Semi-Annual Meeting and One Page Plan Update	Qualified Term/ Account Review
Quarterly Progress Report			Quarterly Progress Report	Total Term and Retirement Review	
Monthly Check-Ins on Financial Planning Tasks					
Ongoing Monitoring and Responding to Life Events					
Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter

Legend:	Meetings	Financial Planning	Quarterly Reports	Newsletters
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