The WELLth Experience Service Calendar

WELLth
BE YOUR BEST FINANCIAL SELF

Investment Planning Focus		*Tax Planning Focus*	*Cash Flow, Retirement, & Budgeting Focus*		*Investment Planning Focus*		*Education & Estate Planning Focus*	*Insurance & Employee Benefits Focus*		*Investment Planning Focus*	
January	**February**	**March**	**April**	**May**	**June**	**July**	**August**	**September**	**October**	**November**	**December**
Economic outlook seminar or webinar		Last minute tax checkup @ discussion with your tax professional	Update comprehensive financial plan and coordinate investments with goals & life changes	Update comprehensive financial plan and coordinate investments with goals & life changes		Economic outlook seminar or webinar	Education planning review		Annual discussion on maximizing employee benefits		End of year tax checkup & capital gains discussion with you and/or tax professional
Internal portfolio review & ongoing investment management	Internal portfolio review & ongoing investment management	Internal portfolio review & ongoing investment management	Internal portfolio review & ongoing investment management	Internal portfolio review & ongoing investment management	Internal portfolio review & ongoing investment management	Internal portfolio review & ongoing investment management	Internal portfolio review & ongoing investment management	Internal portfolio review & ongoing investment management	Internal portfolio review & ongoing investment management	Internal portfolio review & ongoing investment management	Internal portfolio review & ongoing investment management
Investment performance reporting	Investment performance reporting	Investment performance reporting	Investment performance reporting	Investment performance reporting	Investment performance reporting	Investment performance reporting	Investment performance reporting	Investment performance reporting	Investment performance reporting	Investment performance reporting	Investment performance reporting
Investment allocation and performance review meeting			Goal funding, cash flow, & retirement needs analysis	Goal funding, cash flow, & retirement needs analysis			Estate planning checkup		401k contribution & allocation review		
Creation of new economic and asset class forecasts			Personal balance sheet & cash flow statement creation	Personal balance sheet & cash flow statement creation					Life & property insurance review		
Annual portfolio rebalance	Annual portfolio rebalance		Personal budget update and reports	Personal budget update and reports							
			Debt analysis & optimization	Debt analysis & optimization							

Personal Finance & Budgeting
Retirement & Goal Planning
Insurance & Benefits Planning
Investment Planning & Management
Tax Planning
Estate Planning

Additional Benefits
Unlimited calls to discuss life changes, major purchases, and other financial matters
Unlimited face-to-face or virtual meetings
Frequent communication & blog posts on financial markets and wellness
Negotiation assistance for major purchases & job offers
Coordination of financial plan with your tax and legal professionals
Counselling to improve financial habits and relationship with money