

Year in the Life of a [Firm Name] Client

Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
What YOU are doing											
Attend “Forecast Report” Webinar	Attend New Client Welcome Dinner	Read Quarterly Newsletter Attend Client Appreciation Event	Review Quarterly Performance Statements Attend Client Educational Event	Attend “Shred Day” Event	Mid-Year Update Review Meeting Read Quarterly Newsletter	Attend “Half-Time Report” Educational Webinar Review Quarterly Performance Statements	Attend Charity Golf Tournament & Gala Event	Read Quarterly Newsletter	Attend Client Educational Event Review Quarterly Performance Statements	Attend Pie Giveaway Event	Year-End Planning Strategy Meeting Read Quarterly Newsletter
What WE are doing											
Monitor Account Transfers Implement Financial Planning Recommendations Monthly Investment Committee Meeting Portfolio Review & Rebalancing Monitor Financial Plan New Client Welcome Dinner Portfolio Review & Rebalancing Monitor Financial Plan “Forecast Report” Educational Webinar Send Quarterly Performance Statements	Monthly Investment Committee Meeting Portfolio Review & Rebalancing Monitor Financial Plan New Client Welcome Dinner	45-Day Implementation Meeting Monthly Investment Committee Meeting Portfolio Review & Rebalancing Monitor Financial Plan Send Quarterly Newsletter Client Appreciation Event	Monthly Investment Committee Meeting Portfolio Review & Rebalancing Monitor Financial Plan Send Quarterly Performance Statements Client Educational Event	Monthly Investment Committee Meeting Portfolio Review & Rebalancing Monitor Financial Plan Schedule Mid-Year Update Review Meetings “Shred Day” Event	Monthly Investment Committee Meeting Portfolio Review & Rebalancing Monitor Financial Plan Mid-Year Update Review Meetings Send Quarterly Newsletter	Monthly Investment Committee Meeting Portfolio Review & Rebalancing Monitor Financial Plan “Half-Time Report” Educational Webinar Send Quarterly Performance Statements	Monthly Investment Committee Meeting Portfolio Review & Rebalancing Monitor Financial Plan Charity Golf Tournament & Gala Event	Monthly Investment Committee Meeting Portfolio Review & Rebalancing Monitor Financial Plan Send Quarterly Newsletter	Monthly Investment Committee Meeting Portfolio Review & Rebalancing Monitor Financial Plan Send Quarterly Performance Statements Client Educational Event	Monthly Investment Committee Meeting Portfolio Review & Rebalancing Monitor Financial Plan Schedule Year-End Planning Strategy Meetings Pie Giveaway Event	Monthly Investment Committee Meeting Portfolio Review & Rebalancing Monitor Financial Plan Year-End Planning Strategy Meetings Send Quarterly Newsletter