



**Maryland**  
 11 N. Washington Street, # 720  
 Rockville, MD 20850  
**Virginia**  
 20365 Exchange Street, # 200  
 Ashburn, VA 20147

# Client Service Calendar

## EveryDay

- Team of experts available to you
- Guarding your wealth through cybersecurity
- 24/7 access to online performance
- Financial Life Overview dashboard

## EveryMonth

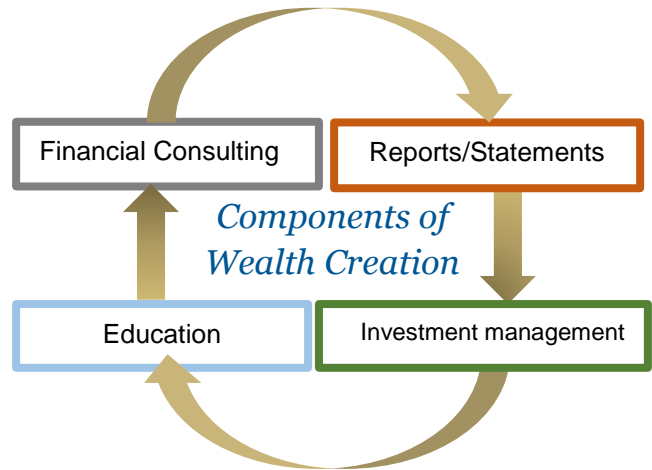
- Ongoing portfolio monitoring
- Manage deposits and withdrawals
- Ongoing investment and economic research
- Custodian statements
- Weekly financial planning blog posts

## EveryQuarter

- Portfolio rebalancing
- Performance report
- Investment Review and Market Review

## EveryYear

- Client meetings
- Tax package sent to you or your CPA
- Tax loss trading
- Required Minimum Distribution strategy
- Review outside retirement plans
- Alerts with analysis of notable market activity



## WealthPlanning

- Financial projections for major decisions
- Coordinating with your professional team
- Estate Plan and Risk Management review
- Portfolio Development Report
- College Projections
- Retirement Projections
- Cash Flow Analysis
- Business Cash Flow Modeling
- Retirement Income Security Plan
- Multi-Generational Wealth Planning

\* Certain components occur throughout the year. The timing of services varies by the client's individual needs.