



GREEN MOUNTAIN PLANNING

Green Mountain Planning - Sample Schedule of Services

January	February	March	April	May	June
Review Investment accounts, re-balance as needed.	Tax Reporting Forms Review	Update Retirement Projections and Financial Goals	Review Investment accounts, re-balance as needed.	Insurance Policy Review/Check-In	Educational Funding & 529 Account Review
Annual Budgeting & Debt Review	Stock Market Outlook	IRA Contribution Check-In	Semi-Annual Live/Virtual Check-In	Tax Return Review	Credit Score and ID protection Review

July	August	September	October	November	December
Mid-Year Cash Flow Check-In	Stock Market Outlook	Estate Planning Check-In	Semi-Annual Live/Virtual Check-In	End-Of-Year Tax Planning Review	Year end Review
Review Investment accounts, re-balance as needed.	Charitable/Philanthropic Check-In	Employee Benefits Review	Review Investment accounts, re-balance as needed.	401(k) Election Review	Personal/Professional Goal Setting

Legend:	Investments	Financial Planning	Tax-Related Planning	Personal Finance
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