GOULARD
FINANCIAL PLANNING

Annual Client Service Calendar

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
Review Prior Year Goals & Action Items *Look Back*	Salary Benchmark	Check Credit Report *Equifax*	File Tax Return	Review W-4 *Update Withholding*	Student Loan Review
Update Goals & Financial Planning Projections *Look Forward*	Gather Tax Documents *1099s Released*		Qualified Retirement Account Contributions *IRA, Roth IRA, SEP*	Upload Completed Tax Return to Client Portal *Federal, State, Schedules, Vouchers*	Budget & Cash Flow Review
Values Discussion & Tools	Schedule Appointment w/ CPA		Values Discussion & Tools		
Rebalance 401(k) & Investment Accounts			Rebalance 401K & Investment Accounts		
Winter Progress Check In			**Spring Progress Check In**		
RECURRING					
Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*

LEGEND	Financial Planning	Income Tax Planning	Investment Planning	Meeting/ Contact	Life Planning

JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Mortgage Analysis / Homebuyer Education	Check Credit Report *TransUnion*	Roth Conversion & Rollover Opportunities	Employee Benefits Review *Open Enrollment*	Use it or Lose it FSA	Check Credit Report *Experian*
Values Discussion & Tools	Estate Planning Review *Beneficiaries, Will, AMD, POA*	Capital Gain and Loss Harvesting	Extension Filing Deadline	Budget & Cash Flow Review	401(k)/403(b)/457 Deferral Review
Rebalance 401(k) & Investment Accounts	Career Development		Values Discussion & Tools	End-Of-Year Tax Planning Review	Review 401(k) Fund Menu
Summer Progress Check In			Rebalance 401(k) & Investment Accounts	Charitable Giving *Cash, Stock or Payroll*	
			Fall Progress Check In		
		RECURRING			
Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*

LEGEND	Financial Planning	Income Tax Planning	Investment Planning	Meeting/ Contact	Life Planning