Ongoing Service Calendar

Every Meeting:
Net Worth
Managed Investments
Ongoing Tasks
Current Events

Every Year:
Cash Flow
Tax Return Review
Retirement Projections
Year-End Tax Planning
Employee Benefits
College Planning

Every 2 Years:
Charitable Giving
Outside Investment & Risk Tolerance Review

Every 3 Years:
Estate Planning
Family Obligations
Risk Management & Insurance

Other topics we regularly discuss when relevant:

- Clergy Housing Allowance
- Donor-Advised Fund Strategy
- Public Service Loan Forgiveness Recertification
- Large Purchase Planning
- Qualified Charitable Distributions
- Required Minimum Distributions
- Rebalancing Outside Investments
- Credit Score
- Satisfaction With Career
- Satisfaction With Retirement