

# Annual Service Calendar

## January

Annual Tax Letters

Annual Paystub  
Review

## February

Investment Strategist  
Review

Investment Policy  
Statement Review

## March

Beneficiary Letters

Quarterly Rebalance

## April

Tax Return Review

Spring Planning  
Meeting

## May

Spring Planning  
Meeting

## June

Quarterly Rebalance

## July

Mid-Year Stewardship  
Report

Planning Tasks  
Review

## August

Insurance Review

Estate Review

## September

Quarterly Rebalance

## October

Tax Planning  
Projection Report

Fall Planning  
Meeting

## November

Fall Planning  
Meeting

## December

Quarterly Rebalance

## Additional Services

*Unlimited On-Call Support*

*Trust & Will Partnership*

*PharmD Weekly Email*

*Investment Management*

*Customized Online Portal and App*

*Professional Liaison*