

<i>January</i>	<i>February</i>	<i>March</i>	<i>April</i>	<i>May</i>	<i>June</i>
Annual Tax Letter	Investment Portfolio Review	Beneficiary Letter	Spring Planning Meetings	Spring Planning Meetings	Quarterly Rebalance
		Quarterly Rebalance	Tax Return Reports		
<i>July</i>	<i>August</i>	<i>September</i>	<i>October</i>	<i>November</i>	<i>December</i>
Planning Task List Review	Tax Year Projection Updates	Quarterly Rebalance	Fall Planning Meetings	Fall Planning Meetings	Quarterly Rebalance
					Year-End Task Reviews

Additional Services

- Unlimited On-Call Support

Trust & Estates Partnership
- PharmD Weekly Email

Open Investment Architecture
(If Needed. Not Required)
- Customized Online Portal and App

Professional Liaison Services