TUSHINGHAM
WEALTH STRATEGIES

Annual Client Service Calendar

January	February	March	April	May	June
Rebalance 401(k) & Investment Accounts	Mortgage Rate Review	Update College & Retirement Projections	Mortgage Rate Review	Defensive Planning Review/Check-In	Mortgage Rate Review
Annual Budgeting & Debt Review	Quarterly Call	IRA Contribution Check-In		2nd Qtr. Tax Review	
Check Annual Credit Score		1st Qtr. Tax Review		Quarterly Call	

July	August	September	October	November	December
Mid-Year Cash Flow Check-In	Mortgage Rate Review	Estate Planning Check-In	Mortgage Rate Review	End-Of-Year Tax Planning Review	Mortgage Rate Review
Rebalance 401(k) & Investment Accounts	3rd Qtr. Tax Review	Annual Planning Update	Benefits Review	Quarterly Call	4th Qtr. Tax Review
	Quarterly Call		College Planning Analysis	Medicare Insurance Review	401(k) Election Review

Legend:	Investments	Financial Planning	Tax	Communication

building a solid future

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