

Here's your personalized meeting plan — please review, then select what you'd like to cover.

Name:

Months We Will Meet:

WHAT YOU SELECTED

Your meeting frequency, based on our last review together.



Quarterly

Every 3 months



Semiannual

Every 6 months



Annual

Once a year



As Needed

Life-event driven

FOR THIS MEETING — WHAT WOULD YOU LIKE TO DISCUSS?

Select the topics below so we can make the most of your time together. The order doesn't have to be by season — it's just a guidance to help you.

WINTER

Build Your Foundation

- ☐ Retirement Income Planning
- ☐ Required Minimum Distributions (RMDs)
- ☐ Roth Conversion Analysis
- ☐ Tax Planning Opportunities
- ☐ Social Security Strategies
- ☐ Cash Flow Planning
- ☐ Annual Financial Plan Updates

SPRING

Grow Your Wealth

- ☐ Investment Strategy Reviews
- ☐ Portfolio Rebalancing
- ☐ Asset Allocation Reviews
- ☐ Retirement Readiness
- ☐ Education Savings Planning
- ☐ Employer Retirement Plans
- ☐ Goal & Lifestyle Planning

SUMMER

Protect What Matters

- ☐ Estate Planning Coordination
- ☐ Beneficiary Reviews
- ☐ Insurance Reviews
- ☐ Emergency Fund Analysis
- ☐ Asset Protection Strategies
- ☐ Long-Term Care Planning
- ☐ Trust & Legacy Planning

FALL

Prepare for the Future

- ☐ Year-End Tax Planning
- ☐ Roth Conversion Opportunities
- ☐ Qualified Charitable Distributions (QCDs)
- ☐ Tax-Loss Harvesting
- ☐ Retirement Contribution Reviews
- ☐ Medicare Planning
- ☐ End-of-Year Financial Checklist

ONGOING INVESTMENT MANAGEMENT

Check anything you'd like emphasized between meetings.

- | | |
|--|---|
| ☐ Portfolio Monitoring | ☐ Cash Management |
| ☐ Investment Strategy Adjustments | ☐ Market & Economic Updates |
| ☐ Portfolio Rebalancing | ☐ Retirement Income Planning |
| ☐ Tax-Efficient Investing | ☐ Social Security Reviews |
| ☐ Tax-Loss Harvesting | ☐ Coordination with Your CPA & Estate Attorney |
| ☐ Roth Conversion Planning | ☐ Annual & Ongoing Financial Plan Updates |
| ☐ RMD Management | |

WE'RE HERE WHENEVER LIFE HAPPENS

Check anything currently on the horizon for you — we'll reach out sooner if so.

- | | |
|---|---|
| ☐ Retirement | ☐ Starting or Selling a Business |
| ☐ Job Change | ☐ Health Changes |
| ☐ Marriage or Divorce | ☐ Loss of a Loved One |
| ☐ Birth of a Child or Grandchild | ☐ Questions About Your Investments |
| ☐ Inheritance | ☐ Any Major Financial Decision |
| ☐ Buying or Selling a Home | |

ANYTHING ELSE ON YOUR MIND?

Please email this completed form to us at least one week before your scheduled meeting so we have time to prepare.

If your selections indicate we'll need additional documents, we'll reach out directly to request them.

We believe your financial plan should grow with you. Whether you need annual reviews, semiannual meetings, or ongoing guidance throughout the year, we're committed to helping you make confident financial decisions through every stage of life.

Let's Grow Together

BUILDING • GROWING • PROTECTING • ENJOYING YOUR WEALTH

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