

Your Annual Service Calendar

A proactive, year-round plan with one goal: to improve your life

Q1 SET UP THE YEAR JAN - MAR

Close out last year and get this year set up right.

BUSINESS
Wrap up last year's numbers and set up this year's plan.

PLANNING
Ensure your legacy and estate plans reflect your wishes.

TAX
File prior year returns and coordinate tax payments.

You close out last year and set up this one, with your estate plan confirmed current.

Q2 PLAN FOR THE FUTURE APR - JUN

Step back and rebuild your full plan.

BUSINESS
Review business performance, growth plans, and owner comp.

PLANNING
Update retirement, goals, and investments.

TAX
A quick check to confirm last year didn't change the picture.

You see your whole plan in one place and have clarity on where you're headed.

Q3 FORECAST & STRATEGIZE JUL - SEP

See your forecasted tax numbers in order to make the moves that matter.

BUSINESS
Forecast business performance and tax impacts.

PLANNING
Close any gaps in insurance, benefits, or asset protection.

TAX
Forecast taxes and strategize the moves while they still count.

You know your real tax number with time to act, and your coverage fits your life.

Q4 FINALIZE OCT - DEC

Make the final adjustments before the year closes.

BUSINESS
Plan for the next year and evaluate major decisions.

PLANNING
Confirm retirement contributions and estate action items.

TAX
Execute year-end tax planning and contribution strategies.

You lock in the last tax moves and contributions while they still count.

• ONGOING THROUGHOUT THE YEAR •

Investment Management



We watch your portfolio, so you don't have to



We capture tax savings as markets move



We manage your cash so it's there when you need it



We manage the portfolio risk to match your goals

Advisory Access



We check in regularly and respond quickly



We bring you opportunities proactively



We put a full team behind you



We guide you through life's transitions

One independent, fiduciary team, working across your business, plan, taxes, and investments all year, with one goal: to improve your life.

The content contained herein is for informational purposes and may be subject to change at any time without notice*