## April - June, July - September, **Scheduled Activities Scheduled Activities** eview Financial Vision eview Financial Vision 2 eview Goals 2 eview Goals 3 oadmap eview 3 oadmap eview 4 Asset Allocation Review 4 Estate Planning Overview 5 Investment Review 5 Trusts and Taxes January - March, 6 Ed: Estate Planning October - December, 6 Ed: Corporate Holdings **Scheduled Activities Scheduled Activities Data Gathering** eview Financial Visison 2 eview Goals 2 Document eview 3 Prioritize Goals and Objectives 3 oadmap eview **4 Corporate Tax and Transition** 4 Present Financial Vision **5 Corporate Holdings Strategies** 5 Present Key ecommendations 6 Introduce oadmap 6 Ed: Insurance 7 Ed: Benefits of Consolidation lient Engagement Roadmap October - December, January - March, **Scheduled Activities Scheduled Activities** eview Financial Vision eview Financial Vision 2 eview Goals 2 eview Goals 3 oadmap eview 3 oadmap eview 4 Budget for Retirement **4 Insurance Overview** 5 Review of Planned Expenditures **5 Insurance Options** 6 Ed: What's Important to You! July - September, April - June, 6 Ed: Market Overview **Scheduled Activities Scheduled Activities** eview Financial Vision eview Financial Visison 2 eview Goals 2 eview Goals 3 oadmap eview 3 oadmap eview 4 Vacation Planning and Budget 4 Asset Allocation Review 5 Toys and Major Entertainment 5 Investment Review

6 Ed: Trips and Toys

6 ED: etirement Budget