Quarterly Roadmap for John & Jane Doe

September – December, 2012 Scheduled Activities

- √ Data Gathering
- √ Financial Needs Assessment
- √ Tax Strategy Review
- √ Long-range Plan
- √ Investment Review

January – April, 2013 Scheduled Activities

1. Review Existing Plans
2. Road Map Review
3. Investment Implementation
4. Life Insurance
5. Estate Plans Updated
6. ED: Lifeboat Drill

May – August, 2013 Scheduled Activities

- Goals Review
- Road Map Review
- Investment Review
- Insurance Implementation
- Estate Plans Completed
- ED: Long-term View of the Market

September – December, 2013 Scheduled Activities

- Review Existing Plans
- Roadmap Review
- Investment Review
- Estate Planning
- Client Satisfaction Review

January – April, 2013 Scheduled Activities

- Goals & Situation Review
- Roadmap Review
- Investment Review
- Education Planning
- ED: US Equities

May – August, 2014 Scheduled Activities

- Goals & Situation Review
- Roadmap Review
- Investment Review
- Disability Insurance
- ED: Fixed Income

September – December, 2014 Scheduled Activities

- Goals & Situation Review
- Roadmap Review
- Investment Review
- Long Term Care Insurance
- ED: International Investing

January – April, 2014 Scheduled Activities

- Goals & Situation Review
- Roadmap Review
- Investment Review
- Family Meeting
- ED: Legacy Planning