## Jamie Middleton January - March April - June **Scheduled Activities Scheduled Activities** 1 Goals Review (are we on track?) 1 Goals Review (are we on track?) 2 Roadmap Review 2 Roadmap Review 3 Investment Review 3 Investment Review 4 Wills & POAs 4 Estate Planning 5 ED: Wills & POAs 5 ED: Spending Review October - December July - September **Scheduled Activities Scheduled Activities Data Gathering** 1 Goals Review (are we on track?) Roadmap Review 2 Roadmap Review ✓ Financial Goals 3 Investment Review Investment Review 4 Spending Review ✓ ED: Estate Planning 5 ED: Year End Tax Planning Quarterly Roadmap for John & Jane Sample July - September October - December **Scheduled Activities Scheduled Activities** 1 Goals Review (are we on track?) 1 Goals Review (are we on track?) 2 Roadmap Review 2 Roadmap Review

## April - June **Scheduled Activities**

- 1 Goals Review (are we on track?)
- 2 Roadmap Review

3 Investment Review

4 Insurance Review

5 ED: Risk Mitigation

- 3 Investment Review
- 4 Model Portfolios
- 5 ED: Insurance Review

## January - March **Scheduled Activities**

- 1 Goals Review (are we on track?)
- 2 Roadmap Review
- 3 Investment Review
- 4 Alternative Investments
- 5 ED: Model Portfolios

- 3 Investment Review
- 4 Year-end Tax Planning
- 5 ED: Alternative Investments

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