DISCOVERY
WEALTH PLANNING

Annual Client Service Calendar

January	February	March	April
DWP Tax Prep Letter	Quarterly DWP Meeting	Investment Accounts Review/Re-Balance	Investment Policy Statement (IPS) Update

Focus
Client Priorities
Non-Financial Elements (Goals, Values, Life Events, etc)

May	June	July	August
Quarterly DWP Meeting	Investment Accounts Review/Re-Balance	Insurance & Estate Review	Quarterly DWP Meeting

Focus
Client Priorities
Investments

Focus
Client Priorities
Insurance & Estate

September	October	November	December
Investment Accounts Review/Re-Balance	Tax Planning/Projection	Quarterly DWP Meeting	Investment Accounts Review/Re-Balance

Focus
Client Priorities
Tax, Investments, Cash Flow