# Annual Client Service & Communications Calendar

*Topics are suggestions and can be changed based on client need.*

| JANUARY | FEBRUARY | MARCH | APRIL | MAY | JUNE |
|---|---|---|---|---|---|
| Review (and update, if appl.) Paycheck Withholdings | Gather Tax Documents | **Schedule Spring Meeting** | File Taxes | ***Spring Meeting* (Month/Date may vary)** | Cash Flow/Budget |
| Download and Review Credit Reports | Schedule Appointment w/ CPA, if appl. | | Retirement Account Contributions Deadline (IRA, Roth IRA, SEP) | Upload Completed Tax Return and Schedules | |
| Rebalance Retirement Accounts | | | | | |
| ***RECURRING*** | | | | | |
| Blog | Blog | Blog<br>Firm Newsletter | Blog | Blog | Blog<br>Firm Newsletter |

| JULY | AUGUST | SEPTEMBER | OCTOBER | NOVEMBER | DECEMBER |
|---|---|---|---|---|---|
| Insurance Review | Beneficiary Review | **Schedule Fall Meeting** | Open Enrollment (Employee Benefits) | ***Fall Meeting* (Month/Date may vary)** | Use It or Lose It FSA |
| Rebalance Retirement Accounts | | | FAFSA<br>Student Aid Deadline | *Client Appreciation!* | End-Of-Year<br>Tax Planning |
| | | | Tax Extension Filing Deadline | | |
| ***RECURRING*** | | | | | |
| Blog | Blog | Blog<br>Firm Newsletter | Blog | Blog | Blog<br>Firm Newsletter |