Monthly TFP Client Service Calendar (Year 1)

fpPATHFINDER

Title	Topics	Action Steps
Onboarding (Month 1)	-Address Urgent Questions & Concerns -Meeting #1: Money Mindset Workshop (60 min.)	-Discover your money personality with assessment tools -Clarify your values (What's important about money to you?) -Envision your ideal life and set goals
Onboarding (Month 2)	-Information Gathering and Document Submission -Meeting #2: Initial Financial Plan Delivery (60 min.)	-Analyze your personal balance sheet & income statement -Understand your current ability to meet financial goals and recommendations for what's next
Onboarding: Investments (Month 3)	-Meeting #3: Designing your Portfolio (60 min) -Transfer or Open Investment Accounts (if needed)	- Discuss investment philosophy & ESG options -Discover your personal risk tolerance -Design a portfolio to meet your goals
Onboarding: Technology (Month 4)	-Video Lesson: Your Technology Tools at TFP - Email Follow-up & Answer Questions	- Learn where to find your financial plan and investment accounts online - Learn about other online resources provided to you as a client
Employee Benefits (Month 5)	- Advisor review of employee benefit package	- Share your employer-provided benefit documents and statements
Employee Benefits Cont. (Month 6)	- Meeting #4: Employee Benefits (30 min)	-Understand how to get the most out of your employee benefits -Review employee stock and deferred compensation plans -Introduction to Insurance Professionals

Credit Management (Month 7)	- Advisor review of client credit standing - Summary sent via email	- Review credit score - Understand ways to improve and maintain your credit score - Learn how to keep your personal financial data safe online
Debt Management (Month 8)	-Meeting #5: Debt Management & Follow-Up (30 minutes)	- Understand your different kinds of debt (student loans, mortgage, credit cards) - Make a plan to pay debt off strategically - Follow-up on outstanding tasks for advisor and client
Tax Planning (Month 9)	-Advisor Review of Last Year's Tax Return & Income YTD	-Client sends advisor tax returns for last 2 years and recent payroll stub
Tax Planning Cont. (Month 10)	- Meeting #6: Ways to Reduce Your Tax Bill (60 min)	-Adjust tax withholdings, allowances -Credit & Deduction Planning -Business tax management -Introduction to tax professionals (if needed)
Investment Review (Month 11)	- Advisor Review of Portfolio Allocations & Performance	-Ensures portfolio construction is in line with client investment policy statement -Email to client provides summary of performance in light of market environment
Year in Review (Month 12)	-Meeting #7: Set Planning Agenda for Next Year (30 min)	-Review accomplishments from last year -Identify areas that need more work -Explore new planning topics

For example purposes only. Each client will get a custom-designed service calendar based on their needs.