

# 2024 Calendar

For Private Clients of AFS

**SPRING STRATEGY MEETING**  
Financial Planning

- Financial Purpose
- Cash Flow & Savings
- Retirement Planning
- Investment Plan
- Risk Management
- Estate Planning

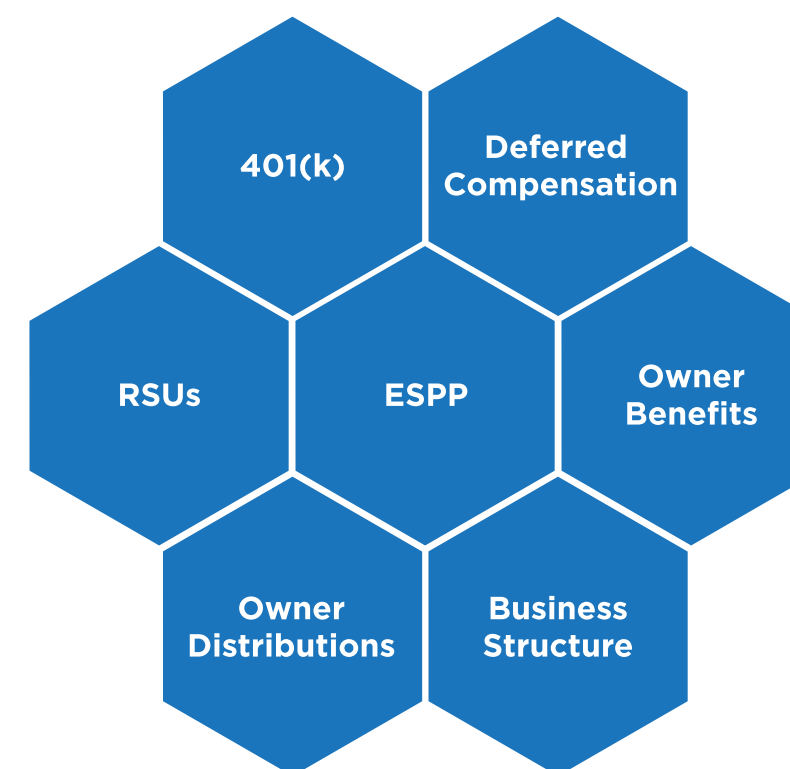
**FALL STRATEGY MEETING**  
Tax Planning

- Tax Saving Strategies
- Charitable Planning
- CPA Coordination
- Business Owner Benefits
- Tax Report
- Tax Projections
- Roth Conversions

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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Tax Prep Letter			Tax Return Review Checklist	QCD Check-In	Estate Planning		Life & LTC Insurance	RMD Check-In	Medicare & Benefits Enrollment		Year-End Checklist

- Monthly Deliverables Key**
- Life Events
  - Financial Planning
  - ▲ Tax Planning
  - ◆ Investment Management
  - ★ Risk & Estate Planning
  - ◆ Business & Benefits Planning

## Business & Retirement Optimization



## Ongoing Advice

**LIFE EVENTS**

- Retirement Transition
- Exit & Succession Planning
- Family Financial Planning
- Age-Based Strategies
- Money-Related Questions

**INVESTMENT MANAGEMENT**

- Personalized
- Tax-Optimized
- Diversified
- Focused on After-Tax Returns