

The 2023 Calendar



CORE	SPECIALTY	JAN	FEB	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPT	OCT	NOV	DEC
CLIENT & ADVICE FULFILLMENT	FIRM CLIENT INITIATIVES	LW ASSESS REVIEW M&E WEBINAR	M&E WEBINAR	M&E WEBINAR	M&E WEBINAR	M&E WEBINAR	M&E WEBINAR	M&E WEBINAR	M&E WEBINAR	M&E WEBINAR	M&E WEBINAR	M&E WEBINAR	LW ASSESS TO CLIENTS M&E WEBINAR
	TEAM DESTINY	PREP + LOOM	PREP/ CLIENT MTGS	CLIENT MTGS/ FOLLOW UP	TAX/ PREP	CLIENT MTGS	FOLLOW UP	FOLLOW UP	COI CHECK-INS	PREP	SURGE	FOLLOW UP + LOOM	YE CLOSE OUT TASKS
	TEAM FOUND.	PREP + LOOM	CLIENT MTGS	FOLLOW UP	PREP	PREP	CLIENT MTGS	FOLLOW UP	PREP	CLIENT MTGS	FOLLOW UP	COI CHECK-INS + LOOM	YE CLOSE OUT TASKS
	TEAM EA	PREP + LOOM	CLIENT MTGS – YEAR AHEAD	FOLLOW UP/ PREP	CLIENT MTGS - INVESTMENTS	CLIENT MTGS - INVESTMENTS	FOLLOW UP	EA RETREAT	PREP – BIZ CONTINUITY	CLIENT MTGS – BIZ PLANNING	PREP- TAX STRATEGY	TAX COORD w/ CPA	YE CLOSE OUT TASKS + BALANCE SHT
	FINANCIAL PLANNING	SURGE PREP	SURGE PREP	TAX LETTERS	SURGE PREP	SURGE PREP	RESEARCH & PLANNING	RESEARCH & PLANNING	SURGE PREP	SURGE PREP	TAX ANALYSIS & ROTH	TAX ANALYSIS & ROTH	YE CLOSE OUT TASKS
	CLIENT OPS			HEAVY APR FOLLOW UP	HEAVY APR FOLLOW UP		HEAVY APR FOLLOW UP	HEAVY APR FOLLOW UP			HEAVY APR FOLLOW UP TAX EXECUTION	HEAVY APR FOLLOW UP TAX EXECUTION	YE RMD, ROTH, QCD
	INVESTMENTS	CAPITAL MKTS REVIEW											CAPITAL MKTS REVIEW
GROWTH FULFILLMENT	PROSPECT	PROSPECT WEBINAR	PROSPECT WEBINAR	PROSPECT WEBINAR	PROSPECT WEBINAR	PROSPECT WEBINAR	PROSPECT WEBINAR	PROSPECT WEBINAR	PROSPECT WEBINAR	PROSPECT WEBINAR	PROSPECT WEBINAR	PROSPECT WEBINAR	PROSPECT WEBINAR
	CONTENT	M&E BLOG NEWSLETTER CEO VIDEO EA DIGITAL PKG	M&E BLOG NEWSLETTER CEO VIDEO EA DIGITAL PKG	M&E BLOG NEWSLETTER CEO VIDEO EA DIGITAL PKG	M&E BLOG NEWSLETTER CEO VIDEO EA DIGITAL PKG	M&E BLOG NEWSLETTER CEO VIDEO EA DIGITAL PKG	M&E BLOG NEWSLETTER CEO VIDEO EA DIGITAL PKG	M&E BLOG NEWSLETTER CEO VIDEO EA DIGITAL PKG	M&E BLOG NEWSLETTER CEO VIDEO EA DIGITAL PKG	M&E BLOG NEWSLETTER CEO VIDEO EA DIGITAL PKG	M&E BLOG NEWSLETTER CEO VIDEO EA DIGITAL PKG	M&E BLOG NEWSLETTER CEO VIDEO EA DIGITAL PKG	M&E BLOG NEWSLETTER CEO VIDEO EA DIGITAL PKG
	EVENTS	LACP VIRTUAL	HCMM MC	LACP RETREAT	SUCCESSION BOOTCAMP	TRUESPACE LACP LEADERS	LACP VIRTUAL LACP BC	EA RETREAT	LACP RETREAT		LACP LAUNCH LACP BC	LACP LAUNCH	LACP LAUNCH
	PROJECTS	WEBSITE UPDATES	WEBSITE UPDATES	WEBSITE UPDATES									
OPERATIONS FULFILLMENT	TEAM EVENTS			TEAM BUILDING IN PERSON Week 3/27			TEAM BUILDING VIRTUAL 6/5 & 6/6				TEAM BUILDING IN PERSON Week 9/25		TEAM BUILDING VIRTUAL 2/11 & 12/12
	TECH	LATTICE ROLLOUT	MSP TRANSITION	MSP ONBOARDING	MSP ONBOARDING								
	VENDOR REV.												
	FINANCE	BILLING CLOSE QTR	FIRM TAX PREP		BILLING CLOSEA QTR	6 MONTH BUDGET REVIEW	6 MONTH BUDGET FINALZED	BILLING CLOSE QTR			BILLING CLOSE QTR		YE CLOSE OUT TASKS
	COMPLIANCE	ACCT MONITOR	COMPLIANCE SOFT. ONBOARD ADV UPDATE	COMPLIANCE SOFT. ONBOARD			ANNUAL COMPLIANCE TRAINING						
	TEAM EXPERIENCE	PERFORMANCE REVIEWS			PERFORMANCE REVIEWS			PERFORMANCE REVIEWS			PERFORMANCE REVIEWS		
	HR/SECURITY	VULNERABILITY TESTING			HEALTH BENEFIT REVIEW								COMPENSATION REVIEW