Client Service Experience

for Corporate Employees

SPRING STRATEGY MEETING
Financial Planning

- Financial Goals
- Cash Flow & Savings
- Retirement Planning
- Portfolio Performance
- Liability Management
- Education Funding

FALL CHECK-IN
Tax & Benefits Planning

- Charitable Planning
- IRA & Backdoor Roth IRA
- CPA Coordination
- Tax w/h Coordination
- Savings Strategy
- Benefits & Health
- Care Elections
- Deferred Comp Elections

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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Tax Prep Letter	ESPP Check-in		RSU Check-in	Company Stock Assessment		ESPP Check-in	Risk & Estate Review				Client Event

Company Benefits Optimization

- 401(k)
- RSUs
- ESPP
- Deferred Comp
- Mega Backdoor Roth 401(k)
- Retirement Account Management

● LIFE EVENTS
▲ FINANCIAL PLANNING
◆ TAX PLANNING
⬟ INVESTMENT MANAGEMENT
✦ RISK & ESTATE PLANNING
★ COMPANY BENEFITS PLANNING

Ongoing Advice

LIFE EVENTS
- Retirement Transition Planning
- Relocation Assessment
- Job Offer Assessment
- Estate Planning Objectives & Execution
- Any $ Related Question

INVESTMENT MANAGEMENT
- Diversified
- Low Cost
- Proactive Tax Management
- Pursuing Higher Expected Returns

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