Annual Client Service & Communications Calendar

Hereford Financial

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
Review Prior Year Goals & Action Items *Look Back*	Salary Benchmark	Life & Disability Insurance	Check Credit Score *Equifax*	Student Loan & Consumer Debt Assessment	Property & Casualty Insurance
Update Goals & Financial Planning Projections *Look Forward*	Gather Tax Documents *1099s Released*	401(k) Deferral Review	File Tax Return	Review W-4 *Update Withholding*	Budget & Cash Flow
Rebalance 529 Plans	Schedule Appointment w/ CPA	Review 401(k) Fund Menu	Qualified Retirement Account Contributions *IRA, Roth IRA, SEP*	Upload Completed Tax Return *Federal, State, Schedules, Vouchers*	Quarterly Tax Projections & Estimated Tax Payments *June 15th*
Quarterly Projections & Estimated Tax Payments *January 15th*	Meeting #1	Educational Webinar *Investments/ Tax*	Quarterly Projections & Estimated Tax Payments *April 15th*	Meeting #2	Client Appreciation Event
Rebalance 401(k) & Investment Accounts			Rebalance 401K & Investment Accounts		
RECURRING					
Firm Newsletter *Quarterly Market Update*	Firm Newsletter *Blog*	Firm Newsletter	Firm Newsletter *Quarterly Market Update*	Firm Newsletter *Blog*	Firm Newsletter
Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*
Monthly Investment Update	Monthly Investment Update	Monthly Investment Update	Monthly Investment Update	Monthly Investment Update	Monthly Investment Update

JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Rebalance 529 Plans	Check Credit Score *TransUnion*	Quarterly Tax Projections & Estimated Tax Payments *September 15th*	Employee Benefits Review *Open Enrollment*	Use it or Lose it FSA	Check Credit Score *Experian*
Mortgage Analysis / Homebuyer Education	Estate Review *Beneficiaries, Will, AMD, POA*	Roth Conversion & Rollover Opportunities	FAFSA Student Aid Deadlines	Budget & Cash Flow	Emergency Reserves Update *Savings Account APRs*
Rebalance 401(k) & Investment Accounts	Career Development	Capital Gain and Loss Harvesting	Extension Filing Deadline	Mutual Fund Distributions	End-Of-Year Tax Planning Review
Educational Webinar *Financial Planning*	Meeting #3	Client Appreciation Event	Rebalance 401(k) & Investment Accounts	Meeting #4	Charitable Giving *Cash, Stock or Payroll*
RECURRING					
Firm Newsletter *Quarterly Market Update*	Firm Newsletter *Blog*	Firm Newsletter	Firm Newsletter *Quarterly Market Update*	Firm Newsletter *Blog*	Firm Newsletter
Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*	Email Clients *Monthly Summary*
Monthly Investment Update	Monthly Investment Update	Monthly Investment Update	Monthly Investment Update	Monthly Investment Update	Monthly Investment Update

LEGEND	Financial Planning	Income Tax Planning	Investment Planning	Event/ Education	Meeting/ Contact