




Quarterly roadmap for Mr & Mrs Client

Jun - Aug, 2010
Scheduled Activities 


1. Data Gathering
2. Risk Analysis
3. Vision Doc
4. Client Engagement Roadmap
5. ED: Survivor Income

Sep - Nov, 2010
Scheduled Activities 


1. Review Vision Document
2. Review Roadmap
3. Are we on track?
4. Survivor Income
5. Ed: Retirement Options

Dec - Feb, 2011
Scheduled Activities 


1. Review Vision Document
2. Review Roadmap
3. Are we on track?
4. Retirement Planning
5. Ed: Budgeting

Mar - May, 2011
Scheduled Activities 


1. Review Vision Document
2. Review Roadmap
3. Are we on track?
4. Spending Plan
5. Ed: Long Term Care

Mar - May, 2012
Scheduled Activities 

1. Review Vision Document
2. Review Roadmap
3. Are we on track?
4. Tax Strategies
5. Ed: Legacy Planning

Dec - Feb, 2012
Scheduled Activities 

1. Review Vision Document
2. Review Roadmap
3. Are we on track?
4. Education Funding
5. Ed: Tax Strategies

Sep - Nov, 2011
Scheduled Activities 

1. Review Vision Document
2. Review Roadmap
3. Are we on track?
4. Review / Modify Wills & Trusts
5. Ed: Education Funding Options

Jun - Aug, 2011
Scheduled Activities 

1. Review Vision Document
2. Review Roadmap
3. Are we on track?
4. Long Term Care
5. Ed: Estate Planning

Optional notes:

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 15/06/10