



Triad 2024 Client Service Calendar

January	February	March	April	May	June
	Update Financial Planning Projections	Annual Plan Review & Calls	Check-In On Ongoing Financial Planning Tasks		
Investment Team Portfolio Review	Investment Team Portfolio Review	Investment Team Portfolio Review	Investment Team Portfolio Review	Investment Team Portfolio Review	Investment Team Portfolio Review
Quarterly Reporting		Tax Reporting Summary	Quarterly Reporting		
Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter
					Random Gift

July	August	September	October	November	December
	Check-In On Ongoing Financial Planning Tasks	Mid Year Plan Review & Calls	Quarterly Reporting	End-Of-Year Tax Planning Analysis & Updates	
Investment Team Portfolio Review	Investment Team Portfolio Review	Investment Team Portfolio Review	Investment Team Portfolio Review	Investment Team Portfolio Review	Investment Team Portfolio Review
Quarterly Reporting			Quarterly Reporting	Tax Loss Harvesting	
Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter
				Holiday Pie	Holiday Gift

Legend:	Investments	Financial Planning	Reporting / Newsletter	Fun Things
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