Maycomb Wealth Annual Member Service Calendar

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
Review Prior Year Goals and Action Items *Look Back*	Salary Benchmark	Review Life and Disability Insurance	Check Credit Score *Transunion*	Student Loan and Consumer Debt Assessment	Property and Casualty Insurance
Update Goals and Financial Planning Projections *Look Forward*	Gather Tax Documents *1099s Released*	401(k) Deferral Review	File Tax Return	Review W-4 *Update Witholding*	Budget and Cash Flow
Review/ 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 and Estimated Tax Payments *June 15th*
Quarterly Projections and Estimated Tax Payments *January 15th*	Review/ Compare eMoney and Custodian Accounts	Rebalance 401(k) and Investment Accounts	Quarterly Projections and Estimated Tax Payments *April 15th*	Review/ Compare eMoney and Custodian Accounts	
	Meeting #1 *Members w/ surname A-M*	**Meeting #1** *Members w/ surname N-Z*			
Firm Newsletter *Quarterly Market Update*			Firm Newsletter *Quarterly Market Update*		

JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Rebalance 529 Plans	Check Credit Score *Equifax*	Quarterly Tax Projections and Estimated Tax Payments *September 15th*	Employee Benefits Review *Open Enrollment*	Flexible Spending Accounts *Use it or Lose it*	Check Credit Score *Experian*
Mortgage Analysis / Homebuyer Education	Review Estate Plan *Beneficiaries, Will, AMD, POA*	Roth Conversion and Rollover Opportunities	FAFSA Student Aid Deadlines	Budget and Cash Flow	Emergency Reserves Update *Savings Account APRs*
	Review/ Compare eMoney and Custodian Accounts		Tax Extension Filing Deadline(s)	Consider Mutual Fund Distributions	End-Of-Year Tax Planning Review
	Career Development			Review/ Compare eMoney and Custodian Accounts	Charitable Giving *Cash, Stock or Payroll*
	Meeting #2 (Optional) *Members w/ surname A-M*	**Meeting #2** (Optional) *Members w/ surname N-Z*			
Firm Newsletter *Quarterly Market Update*			Firm Newsletter *Quarterly Market Update*		

Legend	Financial Planning	Investment Management	Meeting/ Contact	Version Effective Date: 10/5/2020

Maycomb WEALTH