

# Maycomb Wealth Annual Member Service Calendar

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
Review Prior Year Goals and Action Items <i>Look Back</i>	Salary Benchmark	Review Life and Disability Insurance	Check Credit Score <i>Transunion</i>	Student Loan and Consumer Debt Assessment	Property and Casualty Insurance
Update Goals and Financial Planning Projections <i>Look Forward</i>	Gather Tax Documents <i>1099s Released</i>	401(k) Deferral Review	File Tax Return	Review W-4 <i>Update Withholding</i>	Budget and Cash Flow
Review/ Rebalance 529 Plans	Schedule Appointment w/ CPA	Review 401(k) Fund Menu	Qualified Retirement Account Contributions <i>IRA, Roth IRA, SEP</i>	Upload Completed Tax Return <i>Federal, State, Schedules, Vouchers</i>	Quarterly Tax Projections and Estimated Tax Payments <i>June 15th</i>
Quarterly Projections and Estimated Tax Payments <i>January 15th</i>	Review/ Compare eMoney and Custodian Accounts	Rebalance 401(k) and Investment Accounts	Quarterly Projections and Estimated Tax Payments <i>April 15th</i>	Review/ Compare eMoney and Custodian Accounts	
	<b>Meeting #1</b> <i>Members w/ surname A-M</i>	<b>Meeting #1</b> <i>Members w/ surname N-Z</i>			
Firm Newsletter <i>Quarterly Market Update</i>			Firm Newsletter <i>Quarterly Market Update</i>		
JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Rebalance 529 Plans	Check Credit Score <i>Equifax</i>	Quarterly Tax Projections and Estimated Tax Payments <i>September 15th</i>	Employee Benefits Review <i>Open Enrollment</i>	Flexible Spending Accounts <i>Use it or Lose it</i>	Check Credit Score <i>Experian</i>
Mortgage Analysis / Homebuyer Education	Review Estate Plan <i>Beneficiaries, Will, AMD, POA</i>	Roth Conversion and Rollover Opportunities	FAFSA Student Aid Deadlines	Budget and Cash Flow	Emergency Reserves Update <i>Savings Account APRs</i>
	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 <i>Cash, Stock or Payroll</i>
	<b>Meeting #2 (Optional)</b> <i>Members w/ surname A-M</i>	<b>Meeting #2 (Optional)</b> <i>Members w/ surname N-Z</i>			
Firm Newsletter <i>Quarterly Market Update</i>			Firm Newsletter <i>Quarterly Market Update</i>		

## Legend

Financial Planning
Investment Management
Meeting/ Contact

Version Effective Date: 10/5/2020

Disclaimer: Our Service Calendar outlines services, meetings/coordination, and support we may, but are not required to offer. Some may be offered more or less frequently than suggested above. Members must specify in writing if they require certain services in a certain year or on an ongoing basis. We do not offer legal, tax, or insurance-related advice or prepare or file projections, returns, or other documents in these specialized areas. To the extent we refer to these subjects referenced above, our involvement is limited to helping Members plan for their discussions with licensed attorneys, accountants, brokers, and other professionals who are licensed and specialize in these areas, and on whom the Member should solely rely before making decisions. To the extent anything here conflicts with any signed agreement with a Member, the signed agreement controls.

