Quarterly Roadmap for Exceptional Caregivers

April – June, 2010 Scheduled Activities

1. **Initial Goals & Situation Review**
2. Initial Data Gathering
3. Initial Risk Tolerance Profile
4. Survivor Income Planning
5. ED: Special Needs Trust

July – September, 2010 Scheduled Activities

1. Goals & Situation Review
2. Corporate Benefits Review
3. Retirement Planning
4. Life Insurance
5. Beneficiary Review

October – December, 2010 Scheduled Activities

1. Goals & Situation Review
2. Legal Document Review
3. Health Insurance Billing Code - Autism
4. Create Investment Policy Statement
5. Lifeboat Drill

January – March, 2011 Scheduled Activities

1. **Annual Goals & Situation Review**
2. Roadmap Review
3. Disability Insurance
4. Estate Planning
5. Client Satisfaction Review

April – June, 2011 Scheduled Activities

1. Goals & Situation Review
2. Roadmap Review
3. Stock Options Conversion
4. Education Planning / IEP discussion
5. ED: US Equities

July – September, 2011 Scheduled Activities

1. Goals & Situation Review
2. Roadmap Review
3. Investment Review
4. Portfolio Rebalancing
5. ED: Exchange Traded Funds

October – December, 2011 Scheduled Activities

1. Goals & Situation Review
2. Year End Tax Planning
3. Investment Review
4. Long Term Care Insurance
5. ED: International Investing

January – March, 2012 Scheduled Activities

1. **Annual Goals & Situation Review**
2. Roadmap Review
3. Investment Review
4. Family Meeting
5. Letter of Intent