AZIMUTH WEALTH ADVISORY OF RAYMOND JAMES®

Sample Client Calendar

Year 1, Quarter 1 Scheduled Activities

- Goals Review
- Road Map Planning
- Asset Transfers
- Company Stock Diversification
- Retirement Goal Development
- Estate Planning
- Education: Long-term View

Year 1, Quarter 2 Scheduled Activities

- Goals Review
- Road Map Review
- Annuities & Retirement
- Wills / Trust Discussion
- Market/Investment Review
- Charitable Gifting
- Client Appreciation

Year 1, Quarter 3 Scheduled Activities

- Goals Review
- Road Map Review
- Cash Flow / Budget Update
- Asset Allocation Analysis
- Market/Investment Review
- Long-term Care Discussion
- Education: Social Security

Year 1, Quarter 4 Scheduled Activities

- Road Map Review
- Overall Portfolio Analysis
- Year-End Tax Planning
- Market/Investment Review
- Build Advisor Team
- Education: Equity Investing

Year 2, Quarter 1 Scheduled Activities

- Goals Review
- Roadmap Review
- Update Long Range Plan
- Market/Investment Review
- Cash Flow / Budget Update
- Education: Fixed Income

Year 2, Quarter 2 Scheduled Activities

- Goals Review
- Roadmap Review
- Liabilities (Debt) Assessment
- Market/Investment Review
- Client Appreciation
- Major Purchase Goals
- Group DI Review

Year 2, Quarter 3 Scheduled Activities

- Goals Review
- Roadmap Review
- Asset Allocation Analysis
- Update Long-range Plan/Road Map
- Market/Investment Review
- Ed: Investing for Income

Year 2, Quarter 4 Scheduled Activities

- Data Gathering
- Financial Goals
- Risk Tolerance
- Prioritize Goals and Objectives
- Develop Long-range Plan
- Year End Tax Strategy