

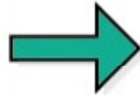


BALLAST POINT FINANCIAL PLANNING

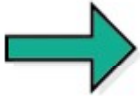
2-YEAR CLIENT SERVICE CALENDAR

YEAR 1

January - June
Balance Sheet Update
Credit Score Check
Update Survey
Financial Independence Review
Tax Return Review
Investment Review

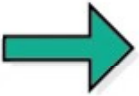


July - December
Balance Sheet Update
Financial Satisfaction Survey
Goal Progress Check
Estate Plan Review
Open Enrollment
Tax Projection



YEAR 2

January - June
Balance Sheet Update
Credit Score Check
Update Survey
Financial Independence Review
Tax Return Review
Investment Review



July - December
Balance Sheet Update
Financial Satisfaction Survey
Goal Progress Check
Beneficiary Check
Insurance Review
Open Enrollment
Tax Projection

LEGEND

Risk (Insurance)	Estate Planning	Taxes
Investments	Financial Planning	Employer Benefits

