

Financial Planning Monthly Calendar

This one pager shows a financial planning monthly calendar task table with details such as monthly agenda, tasks to be done in a month, some important financial tasks details such as checking annual credit score, tax reporting, insurance policy review, budget review, rebalancing accounts etc. on monthly basis.

		2	3	4	5
		8	9	10	11
		14	15	16	17
		20	21	22	23
		24	25		

Calendar Agenda

- This one pager is 100% editable and can be adjusted according to the needs of the user
- Prioritize and list financial tasks in the coming year

Financial Planning Monthly Calendar

Year - 2020

January	February	March	April	May	June
Rebalance 401(k) & Investment Accounts	Capital Gains Tax Reporting Summary	Update College & Retirement Projections	Monthly Newsletter	Insurance Policy Review / Check-In	Monthly Newsletter
Annual Budgeting & Dept Review	Task Here	IRA Contribution Check-In	Educational Webinar Series	Task Here	Educational Webinar Series
Check Annual Credit Score	Educational Webinar Series	Monthly Newsletter		Financial Planning Workshop Event	
Monthly Newsletter					

July	August	September	October	November	December
Mid-Year Cash Flow Check-In	Monthly Newsletter	Estate Planning Check-In	Monthly Newsletter	End-of-Year Tax Planning Review	Employee Benefits Review
Investment Task Here	Educational Webinar Series	Monthly Newsletter	Educational Webinar Series	Monthly Newsletter	Task Here
Monthly Newsletter		Annual Client Appreciation Event			401 (k) Election Review
					Monthly Newsletter

Legend:

Investments

Financial Planning

Reporting /
Newsletter

Client Webinar / Event

Other Important Tasks and Events

- ✓ Declare new financial policy on MM/DD/YYYY
- ✓ Annual Budget Review presentation by XXXX on MM/DD/YYYY at XXXX time
- ✓ Guidelines on Client Appreciation event to be given by XXXXX on MM/DD/YYYY
- ✓ Text Here
- ✓ Text Here