

CLIENT SERVICE CALENDAR

YEAR-ROUND PLANNING

LOZANO GROUP
WEALTH MANAGEMENT

	Dec - Mar	Apr - June	Aug - Nov
Account Rebalancing	✓	✓	✓
Tax-Loss Harvesting	✓	✓	✓
Investing and Distribution Strategies	✓	✓	✓
Equity Comp Review	✓	✓	✓
401(k) Plan Review	✓		
Cash Flow Review	✓		
Investment Updates	✓		
Beneficiary Review	✓		
Tax Letter	✓		
Financial Plan Update		✓	
Cash-Flow Projections		✓	
Balance Sheet Review		✓	
Tax Projection Review		✓	
Gift Planning			✓
Insurance Review			✓
Benefits Plan Review			✓
Investment Update			✓
Tax projecting and AMT Analysis			✓