ENGAGEMENT PLAN AND SERVICE OFFERING

WOODSON WEALTH MANAGEMENT

Annual Roadmap for a Typical Financial Planning and Investment Management Client

Your Subscription Includes:	Q1			Q2			Q3			Q4		
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Financial Plan/ Investments	Rebalance 401 (k)		Rebalance Investments		Update Plan Projections	Rebalance Investments	Rebalance 401 (k)	Beneficiary Update & Estate Plan Review	Open Enrollment Review	Rebalance Investments	Insurance Policy Review	401 (k) Investment Review
Tax Management	Cap Gains Report	Tax Prep Meetings	Meeting w/CPA			Review IRA Contributions						Year-End Tax Planning
	Tax Loss Harvesting											
Budgeting/ Debts		Annual Budget/ Expense Review				Credit Report Review	Mid-Year Cash Flow Check in					
Education/ Other			Webinar			Webinar	Appreciation Event		Webinar			Webinar
	Newsletter											