



## **CTWM Client Meeting Planner**

### **3+ Annual Meetings**

#### ***1<sup>st</sup> Period*** (January, February, March)

- Client Update
- Financial Plan Update
- Market Update
- Comprehensive Investment Review

#### ***2<sup>nd</sup> Period*** (May, June, July)

- Client Update
- Financial Plan Update
- Alternating years:*
  - Comprehensive Risk Management Review
  - Estate Plan Review
- Comprehensive Investment Review

#### ***3<sup>rd</sup> Period*** (September, October, November)

- Client Update
- Financial Plan Update
- Tax Planning
- Comprehensive Investment Review

