

- 1:1 Financial Planning Meetings
- Investments
- Community support & events
- Reporting & Outreach
- Ongoing Weekly

| January | February | March | April | May | June |
|---|------------------------------|----------------------------------|-------------------------|---------------------------------------|---------------------|
| KbC Year End Report | Tax Prep Outreach | Coffee & Donuts Learning Session | Advisory Board Luncheon | Tax Compliance Reviews | Annual Golf Event |
| Dollars for Scholars | PWM Tax Preparation Services | | | Annual Arc of Monroe Clays Tournament | Annual VOC Flag Day |
| Ongoing Investment Activities: weekly economic updates, written briefs, valuation frameworks | | | | | |
| Ongoing Financial Planning Activities: reviews, estate planning, portfolio strategy review, valuation framework | | | | | |
| Monthly Fireside Chat/Market Update Zoom | | | | | |
| Weekly Client Newsletter | | | | | |

| July | August | September | October | November | December |
|---|-----------------------------------|---|---|---------------------|------------------|
| KbC Mid-Year Report | Annual Client Appreciation Picnic | Coffee & Donuts Learning Session | Year End Contribution Limits/Deadlines Outreach | | |
| Lollypop/Rochester Hope for Pets | Advent House Sponsorship | Medicare 101 Client Education | FAFSA Medicare enrollment | Thanksgiving Appeal | Annual Toy Drive |
| | | Advisory Board Luncheon | RMD Compliance /Year end tax loss harvesting | | |
| | | Charitable giving analysis and planning | | | |
| Ongoing Investment Activities: weekly economic updates, written briefs, valuation frameworks | | | | | |
| Ongoing Financial Planning Activities: reviews, estate planning, portfolio strategy review, valuation framework | | | | | |
| Monthly Fireside Chat/Market Update Zoom | | | | | |
| Weekly Client Newsletter | | | | | |

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