



Your financial life deserves thoughtful, ongoing attention. This guide outlines our standard annual service calendar; services are tailored to your needs, and not every item applies or is required. Beyond scheduled reviews, we provide fiduciary guidance in advisory relationships every step of the way—with unlimited phone, email, text, and in-person consultations throughout the year.

Q1 JANUARY – MARCH

January

- Annual Wealth Review (Required)
- New Year Financial Fitness & Budget
- Q4 Estimated Tax Payment
- Quarterly Wrap Newsletter
- Monthly Coffee & Market Update

February

- Tax Planning & Coordination
- Connections & Conversations
- Update CPA, Attorney, and important contacts
- Monthly Coffee & Market Update

March

- Finalize IRA Contributions
- Review HSA contributions
- Investment Strategy Committee
- Monthly Coffee & Market Update

Q2 APRIL – JUNE

April

- Quarterly Progress Check In
- Community & Volunteer Event
- Q1 Estimated Tax Payment Tax Season
- Quarterly Wrap Newsletter
- Monthly Coffee & Market Update

May

- Estate & Legacy Planning Strategies
- 529 College Funding
- Orange County Soccer Club Private Box
- Monthly Coffee & Market Update

June

- 401(k), 403b, 457 plan analysis
- Q2 Estimated Tax Payment
- Investment Strategy Committee
- Monthly Coffee & Market Update

Q3 JULY – SEPTEMBER

July

- Strategic Wealth Review (Recommended)
- A little big vacation
- Quarterly Wrap Newsletter
- Monthly Coffee & Market Update

August

- Life, Disability, LTC Insurance Review
- Educational Dinner
- Life Insurance Retirement Plan (LIRPS)
- Monthly Coffee & Market Update

September

- Business Retirement Plan Reviews
- Charitable Gifting / DAF
- Investment Strategy Committee
- Q3 Estimated Tax Payment
- Monthly Coffee & Market Update

Q4 OCTOBER – DECEMBER

October

- Year End Service Check In
- Tax Planning Strategies with CPA Review Tax Returns
- Open Enrollment - HSA plan - Health Insurance - Medicare
- Quarterly Wrap Newsletter
- Monthly Coffee & Market Update

November

- Required Minimum Distributions & QCDs
- Roth Conversions
- Thanksgiving Client Appreciation Pie
- Monthly Coffee & Market Update

December

- Tax-loss Harvesting
- Year-End Financial Checklist
- Investment Strategy Committee
- Monthly Coffee & Market Update

Resilience Wealth Group and LPL Financial do not provide tax advice or services. Please consult your qualified tax advisor regarding your specific situation.