

# Client Service Experience

For Private Clients of AFS

## FINANCIAL PLANNING Spring Strategy Meeting

- Financial Purpose
- Cash Flow & Savings
- Retirement Planning
- Investment Plan
- Risk Management
- Estate Planning

## LIFE PLANNING Summer Check-in

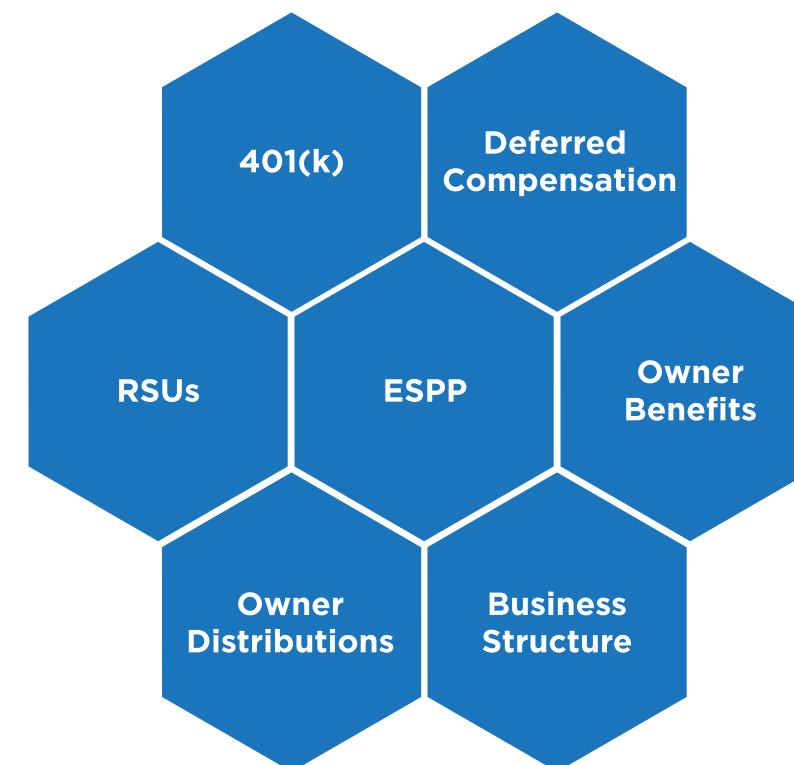
- Follow-up on Action Items
- Adjust Plan as Needed
- Celebrate our Progress
- Share Vacation Stories

## TAX PLANNING Fall Strategy Meeting

- Tax Saving Strategies
- Charitable Planning
- CPA Coordination
- Business Owner Benefits
- Tax Report & Projections
- Roth Conversions

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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Tax Prep Letter			Tax Return Review Checklist	QCD Check-In	Estate Planning		Life & LTC Insurance	RMD Check-In	Medicare & Benefits Enrollment		Year-End Checklist

## Business & Retirement Optimization



## Ongoing Advice

### LIFE EVENTS

- Retirement Transition
- Exit & Succession Planning
- Family Financial Planning
- Age-Based Strategies
- Money-Related Questions

### INVESTMENT MANAGEMENT

- Personalized
- Tax-Optimized
- Diversified
- Focused on After-Tax Returns

### Monthly Deliverables Key

- Life Events
- Financial Planning
- ▲ Tax Planning
- ◆ Investment Management
- ★ Risk & Estate Planning
- ◆ Business & Benefits Planning