Client Service Experience

For Private Clients of AFS

ALBRITTON
FINANCIAL SERVICES

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

- 401(k)
- Deferred Compensation
- RSUs
- ESPP
- Owner Benefits
- Owner Distributions
- Business Structure

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

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