PROGRESS WEALTH MANAGEMENT'S FINANCIAL PLANNING CALENDAR FOR 2023

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PROGRESS WEALTH MANAGEMENT

Our Client Service Calendar

JANUARY - JUNE

- Financial Plan Review (Update Goals, Action Items & Projections
- Balance Sheet Update
- Credit Score Check
- Evaluate Salary against industry standards
- Weekly Newsletter

- Investments Review
- Rebalance 401k + Investment Accounts
- Examine the structure & performance of equity compensation.

- Mid Year Cash Flow Check In

- Insurance Policy Review/Check-In (P&C, Health, Life, DI)

- IRA/HSA Contribution Check-in
- Tax Return Review
- Review Tax Withholdings & Adjust W-4
- Start organizing your tax documents, especially those related to equity compensation (RSUs, stock options, etc)

JULY - DECEMBER

- Revisit your financial plan in preparation for the upcoming year (October).
- Reflect on your financial and career progress over the year, and set goals for the next year (December).

- Review your retirement accounts and aim to maximize contributions before the year ends (November).
- Rebalance 401k + Investment Accounts
- Monitor Vesting Schedule Of Equity Comp & Sell As Appropriate

- Mid Year Cash Flow Check In

- Estate Plan Review/Check-in (update Beneficiaries/will/etc)

- Start your year-end tax planning early (September).
- Take advantage of any last-minute tax deductions, such as charitable donations or tech equipment purchases for your business (December).

RISK MANAGEMENT | INVESTMENT PLANNING | TAX PLANNING | FINANCIAL PLANNING | ESTATE PLANNING | CASH FLOW PLANNING