

PLAYBOOK WORK FLOW BY QUARTER

Playbook Tab	Tasks
Q1	
Financial Statements	Update NWS, CFS, and replace all statements for company generated financial statements.
Taxes	Start gathering your tax documents as they come in the mail or print them up.
Goals & Objectives	Spend time considering not only your short term goals but long term goals and update as need be.
Insurance	Replace insurance documents as they come in*
Q2	
Performance	How is your performance supporting your goals? Do you need to take on more risk or less?
Miscellaneous	Time to clean out that Miscellaeous section. Can't everything in this section find a better home?
Insurance	Replace insurance documents as they come in*
Q3	
Social Security & Pensions	Review your Social Security statements if applicable. Revisit your strategy for filing if you havne't already.
Insurance	Replace insurance documents as they come in*
Q4	
Estate & Legal	Review your Estate Planning documents including a beneficiary review.
Taxes	Be on the look out for property tax statements and start thinking about year end tax strategies.
Insurance	Replace insurance documents as they come in*

*You'll notice that the "Insurance" Tab appears in every quarter. This is because most insurance documents come only once or twice a year and the date differs depending on when you first signed up. Because of this, you should always be ready to replace your insurance documents as you receive them.