

SMITH FAMILY ROADMAP

YEAR ONE

YEAR TWO

1ST QUARTER

- Data Gathering/Financial Plan
- Financial Vision Document
- Client Engagement Roadmap

2ND QUARTER

- Review Vision & Roadmap
- Are we on track?
- Survivor Income for Carol
- Ed: The New Retirementality

3RD QUARTER

- Review Vision & Roadmap
- Are we on track?
- Financial Independence Plan
- Ed: Budgeting

4TH QUARTER

- Review Vision & Roadmap
- Are we on track?
- Spending Plan
- Ed: Education Funding

4TH QUARTER

- Review Vision & Roadmap
- Are we on track?
- Tax Strategies
- Ed: Legacy Planning

3RD QUARTER

- Review Vision & Roadmap
- Are we on track?
- Long-Term Care for Carol
- Ed: Tax Strategies

2ND QUARTER

- Review Vision & Roadmap
- Are we on track?
- Review Wills & Trusts
- Ed: Long-Term Care

1ST QUARTER

- Review Vision & Roadmap
- Are we on track?
- Education Funding for Luke
- Ed: Estate Planning