



# Financial Planning Calendar



Name \_\_\_\_\_

YEAR _____	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
<b>EVENT/TASK</b>	<b>NOTES</b>											
<i>Update Financial Organizer</i>												
<i>Sort Pending Files</i>												
<i>Update Fact Sheets</i>												
<i>Update Financial Position</i>												
<i>CD Maturity Dates</i>												
<i>IRA Maturity Dates</i>												
<i>Property Taxes</i>												
<i>Auto Registration</i>												
<i>Copy YE Statements</i>												
<i>Review &amp; Update Retirement Plans</i>												
<i>Review &amp; Update Education Plans</i>												
<i>Contribute to Retirement Plans</i>												
<i>Contribute to Spouse's Retirement Plans</i>												
<i>Review &amp; Update Investment Plans</i>												
<i>Tax Preparation</i>												
<i>Tax Planning</i>												
<i>Tax Estimates Due</i>												
<i>Tax Return Due</i>												
<i>Review Life Insurance</i>												
<i>Review Disability Insurance</i>												
<i>Review Medical Insurance</i>												
<i>Review Long Term Care Insurance</i>												
<i>Audit Social Security Accts.</i>												
<i>Review Property Insurance</i>												
<i>Review Vehicle Insurance</i>												
<i>Review Excess Liab. Umbrella Policy</i>												
<i>Review Other Insurance Policies</i>												
<i>Review &amp; Update Estate Plan</i>												
<i>Medical Checkup</i>												
<i>Dental Checkup</i>												

