PORTFOLIO
ADVISORS INC.

# ANNUAL SERVICE CALENDAR

## January - March

- 1st Review Meeting of the Year
- Annual Review of Financial Plan
- Portfolio Review & Quarterly Rebalancing
- RMD/QCD Management & Distribution Planning
- Retirement Plan Contributions
- Tax Summary Letter & Document Delivery
- Cash Flow Planning Review & Adjustments

## April - May

- 1st Review Meeting of the Year
- Financial Plan Updates (as needed)
- Portfolio Review & Quarterly Rebalancing
- Tax Return Review & Analysis
- Tax Summary Letter & Document Delivery
- Relationship Review

## August - September

- 2nd Review Meeting of the Year
- Financial Plan Updates (as needed)
- Portfolio Review & Quarterly Rebalancing
- Tax Return Review & Analysis
- Charitable Giving Discussions & Execution
- Cash Flow Planning Review & Adjustments

## October - November

- 2nd Review Meeting of the Year
- Portfolio Review & Quarterly Rebalancing
- Additional RMD/QCD Management & Distribution Planning
- End of Year Tax Planning Opportunities (i.e. tax loss harvesting, capital gain offset)
- Estate Plan Review (every other year)
- Account Beneficiary Review
- Charitable Giving Completion
- Insurance Review (every other year)
- Relationship Review

***To ensure we're fully prepared for our busy fall and winter seasons, we limit client meetings in June and July. We do the same in December to meet year-end deadlines and get ready for spring. However, we're always here for you if something urgent comes up. This downtime also helps us refine our internal processes and business planning, so we can continue providing you with the best service possible.***

**Our Mission: Seeking To Enrich Lives Through Transformative Actions**

7571 N. Remington Avenue, Suite 105 Fresno, CA 93711 559-432-8400 www.Portadvisors.com