

# Sample Topics

## Monthly Planning Subscription

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### JANUARY

Update 401(k)  
elections

### FEBRUARY

Re-run retirement  
projections in  
RightCapital

### MARCH

Make prior year IRA  
contributions

### APRIL

Budget Review

### MAY

Discuss home  
purchase

### JUNE

Review investment  
risk and rebalance

### JULY

Review insurance  
policies

### AUGUST

Evaluate options for  
car loan

### SEPTEMBER

Retitle accounts &  
update beneficiaries  
to new trust

### OCTOBER

Choose employee  
benefits during  
open enrollment

### NOVEMBER

Discuss investment  
options for year-  
end bonus

### DECEMBER

Year end wrap up