proACTION[SM] Business Planning Process
Client Services Calendar

Onramp first. Starting point for planning is to do everything that is relevant and customized to YOU.

Highway cruising second. Flexibility and customization built in.

Sample Annual Client Service Calendar

January	February	March	April	May	June
Business Valuation/ Monetizing the Business	Voluntary Benefits	Non-Qualified / Deferred Compensation	Buy - Sell Agreement & Funding	Life + Disability Insurance - Owners, Key Man, Premium Financing	Long Term Care Insurance / Tax Deductions
Cash Flow / Debt Management	Business Owner's Personal Financial Planning	Attract and Retain Top Talent	Group Benefits	Disability Business Overhead Insurance	Internal Investment Committee Meeting
Qualified Retirement Plans	Business Coach	Retirement Distribution Strategy	Lease Negotiation / Investment Properties	Marketing / SEO / Web Design	Business Banking/Credit Cards
Third Party Administrator / Record Keeper	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	IT Firm
Monthly Newsletter		Account Aggregation & Digital Vault			Monthly Newsletter

July	August	September	October	November	December
Operating Account/Capital Allocation	Commercial Real Estate Team	Intellectual Property / Trademarks	HR Consulting	Business Entity Structure	Financial Wellness for Employees
Business Loans / Lines of Credit	Mortgage Terms / Interest Rate / Refinancing	Asset Protection	Succession Planning / Family Dynamics	CPA Firm / Tax Deductions	Captive Insurance
Mergers & Acquisitions	Business Owners Policy Review	Business Broker	Bank Owned / Corporate Owned Life Insurance	Bookeeping	Equipment Purchases
Annual Client Appreciation Event	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Payroll	Inventory of Assets / Liabilities
Monthly Newsletter				Monthly Newsletter	Monthly Newsletter

Legend: Investments | Insurance | Financial Planning | Reporting/Newsletter | Client Webinar / Event

28 E Susquehanna Avenue | Towson, MD 21286 **Phone & Fax:** 410.600.PLAN (7526) **www.offitadvisors.com**