



GREEN AND GOLD
FINANCIAL PLANNING

Green and Gold Financial Planning
John Cooney, MBA, Enrolled Agent
617-620-5575
john@greenandgoldfinancial.com
www.greenandgoldfinancial.com

Green and Gold Financial Planning Client Service Calendar

January	February	March	April	May	June
Goal and Portfolio Review			Check-In On Ongoing Financial Planning Tasks/ Goal Progression		
	Tax Preparation	Tax Preparation			
On-Going Rebalancing/Loss Harvesting**	On-Going Rebalancing/Loss Harvesting**	On-Going Rebalancing/Loss Harvesting**	On-Going Rebalancing/Loss Harvesting**	On-Going Rebalancing/Loss Harvesting**	On-Going Rebalancing/Loss Harvesting**
Prior Quarter Market Report			Prior Quarter Market Report		
Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter

July	August	September	October	November	December
Check-In On Ongoing Financial Planning Tasks/ Goal Progression		End-Of-Year Tax Planning Meeting			
On-Going Rebalancing/Loss Harvesting**	On-Going Rebalancing/Loss Harvesting**	On-Going Rebalancing/Loss Harvesting**	On-Going Rebalancing/Loss Harvesting**	On-Going Rebalancing/Loss Harvesting**	On-Going Rebalancing/Loss Harvesting**
Financial Planning Educational Event					
Prior Quarter Market Report			Prior Quarter Market Report		
Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter	Monthly Newsletter

Legend:	Tax Prep	Email Update	Phone Meeting	Face to Face Meeting	Webinar
** Investment Management Clients Only					

On-Going Financial Planning Tasks Can Include

Budgeting and Debt Management
Education Funding Planning
Military Benefit and Retirement Planning

Estate Planning
Benefits
Retirement Income Planning
Insurance Review

Tax Planning
Goal Funding
Retirement Planning

WHAT DOES YOUR FINANCIAL ADVISOR DO FOR YOU?