CURATO
ADVISORY

Annual Financial Planning Calendar

Ongoing – Investment Management and Education; Tax Loss Harvesting

Jan/Feb	• SMART Calculations • Tax Doc Gathering
March/April	• Credit Score Review • Annual Rotation (Insurance, Disability, P&C, Beneficiary Review)
May/June	• Legal Document Gathering • Tax Return Review • Mid-Year Summary
July/Aug	• Goal Progression • Pull SS Statement
Sep/Oct	• Tax Planning/CPA Meeting • Benefit Review • RMD Processing • Family and Heir
Nov/Dec	• Wealth Transfer Strategies • Full Financial Plan

Fiduciary support every step of the way.

No limits on phone calls, emails, remote and in-person consultation time.