CookWealth

Beginning Your Client Experience

Get to Know You

Clarify Your Goals

Present Solutions

Begin Partnership

CookWealth

What You Can Expect Each Year

JAN FEB MAR	• Cash flow planning • Prior year income tax preparation
APR MAY JUN	• Estate planning assessment • Annual goals review *(Spring clients)*
JUL AUG SEP	• Mid-year tax planning • Annual goals review *(Summer clients)*
OCT NOV DEC	• Insurance + benefits consulation • Tax planning + charitable giving consultation

Investment guidance and monitoring provided throughout the year.