

mainstreet

FINANCIAL PLANNING

Navigation Support GOLD Service

Q1



ORGANIZE

- Goals/Milestones Review
- Tackle Roadblocks
- Financial Statement Update
- Portfolio Assessment
- Create Action Items

TOPICS COVERED: RMDs, DEBTS, TAXES,
HOME MAINTENANCE

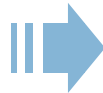
Q2



UPDATE

- Financial Self Satisfaction Discussion
- Financial Statement Update
- Spending Plan Review
- Review Action Item Status
- Portfolio Assessment

TOPICS COVERED: TRANSITIONS, FINANCING
FOR BIG PURCHASES, INSURANCE,
HEALTH CONCERNS, EMERGENCY FUND



Q3



REVIEW

- Money Roadmap Plan Update
- Financial Statement Update
- Review Action Item Status
- Portfolio Assessment
- Create Action Items

TOPICS COVERED: INSURANCE, ESTATE PLAN,
PORTFOLIO WITHDRAWAL

Q4



PLAN

- Year End Planning
- Financial Statement Update
- Review Action Item Status
- Portfolio Assessment

TOPICS COVERED: ROTH CONVERSIONS, RMDs,
DEDUCTIONS, GAINS/LOSSES, CHARITABLE GIFTING



OPTIONAL: TAX PREPARATION AND PLANNING

