FSI WEALTH MANAGEMENT ANNUAL SERVICE CALENDER - EXAMPLE*

DAILY

- Your Access to FSI's Client Center Web Portal
  - Review Your To-Do Items
  - Track Net Worth,
  - Actual Spending vs. Plan Targets,
  - Portfolio Balances, Holdings, and Results,
  - List of Your Goals & Accomplishments, and
  - Retirement Account Beneficiaries, etc.
- FSI Portfolio Monitoring

MONTHLY

- You receive newsletters, blogs, and podcasts (optional)
- FSI Investment Committee Meeting

QUARTERLY

- FSI Reviews your financial situation with email update (Wealth Summary)
- FSI Market Update Video

ANNUALLY

- In-Person or Virtual Review Meeting
- Updated Financial Plan Projections
- Year-End Tax Planning
- Tax Preparation (optional and additional fee)
- Spending Analysis vs. Financial Plan Targets
- Estate and Risk Review
- [Client Appreciation Event]

AS NEEDED

- Your Questions Answered by FSI Team
- Meetings/Calls
- Accountability Coach

*The actual timing of these items will depend on your unique situation. This illustration is meant to be an example of a typical client.

FINANCIAL SYMMETRY