

# YOUR ECON WEALTH EXPERIENCE

Econ Wealth  
Sample Client



	January	February	March	April
<b>Engage</b>	Client Event Newsletter Income Review	Client Event Route 39 Market Beat		Newsletter
<b>Plan</b>		Life Insurance Review		
<b>Invest</b>	Semi-Annual Report	Stock Stories	Tactical Review Call Stock Stories	
	May	June	July	August
<b>Engage</b>	Client Event Tax Return Request Route 39 Market Beat	Client Event Operations Update Call	Client Event Newsletter Income Review	Client Event Route 39 Market Beat
<b>Plan</b>		Legacy Holdings Review	Budget Review	
<b>Invest</b>		Stock Stories	Semi-Annual Report	Stock Stories
	September	October	November	December
<b>Engage</b>		Newsletter Referral Dinner	Client Event Route 39 Market Beat	Open House
<b>Plan</b>	Strategic Review Meeting		Capital Gains Review	
<b>Invest</b>		Stock Stories		Stock Stories