

YOUR ECON WEALTH EXPERIENCE

Client Name:



	January	February	March	April
Engage	*Client Event *Newsletter *Income Call	*Client Event *Operations Update Call *Route 39 Market Beat	*Operations Update Call	*Newsletter *Operations Update Call
Plan	*IRA Contributions *Strategic Review Meeting *Life Insurance Review *PAL Review	*IRA Contributions *Strategic Review Meeting *Life Insurance Review *PAL Review	*Strategic Review Meeting	*Strategic Review Meeting
Invest	*Quarterly Report *Tactical Review Call *401(k) Review Contact	*Stock Stories *Tactical Review Call *401(k) Review Contact	*Tactical Review Call	*Stock Stories *Tactical Review Call
	May	June	July	August
Engage	*Client Event *Tax Return Review *Operations Update Call *Route 39 Market Beat	*Client Event *Income *Operations Update Call	*Client Event *Newsletter *Income Call *Budget Review	*Client Event *Operations Update Call *Route 39 Market Beat
Plan	*Strategic Review Meeting *Life Insurance Review *PAL Review	*Strategic Review Meeting *Legacy Holdings Review *Life Insurance Review *PAL Review	*Life Insurance Review *PAL Review	*College Planning Review *Strategic Review Meeting *Life Insurance Review *PAL Review
Invest	*Tactical Review Call *401(k) Review Contact	*Stock Stories *Tactical Review Call *401(k) Review Contact	*Quarterly Report *401(k) Review Contact	*Stock Stories *Tactical Review Call *401(k) Review Contact
	September	October	November	December
Engage	*Operations Update Call	*Newsletter *Referral Dinner *Operations Update Call	*Client Event *Operations Update Call *Route 39 Market Beat	*Open House *Income
Plan	*Strategic Review Meeting	*Strategic Review Meeting	*Capital Gains Review *Strategic Review Meeting *Life Insurance Review *PAL Review	*Life Insurance Review *PAL Review
Invest	*Tactical Review Call	*Stock Stories *Tactical Review Call	*Tactical Review Call *401(k) Review Contact	*Stock Stories *401(k) Review Contact