Concentus Wealth Advisors

Meeting Protocol

On an ongoing basis, we'll conduct a rigorous and disciplined annual review program in order to ensure that your plan stays on track. Here's what to expect:

Meeting	Key Objectives	Suggested Timing	Recommended Location	Notes
Annual Review Key Priority Meeting	Balance Sheet Review Review/Update Wealth Policy Statement: • Planning Assumptions • Probability Score Analysis • Analysis of Spending/Savings vs Budget • Review Investment "Buckets" • Rebalance & Refill "Buckets" Portfolio Progress Report	**Jan thru May**	In Person	
Checklist Meeting A Mid-Year Review	Balance Sheet Review Review "On Track" Status to Spending/ Saving The WealthTrak Navigator℠: Ensure all wealth planning topics are addressed, using our proprietary checklist	**Jun thru Sep**	In Person or Video/ Teleconference	
Year End Strategy Session Tax, Investment & Planning Review	Balance Sheet Review Review Tax Strategy (including your CPA recommended) Execute Year-End Tax, Investment & Planning actions as needed	**Oct thru Dec**	In Person or Video/ Teleconference	
Catch-Up Call	Call to check-in/catch-up	On Demand	Video/ Teleconference	

To learn more about how we use Checklists and to view a sample of our proprietary **The Wealth*Trak* Navigator℠** Checklist, **CLICK HERE**.

610-994-9190 | info@concentus.com | www.concentus.com