



## Supernova 24 Month Calendar 12/4/2 Topics

JAN: Full year Outlook  
FEB: Annuity Review  
MAR: Annuity Review Follow Up  
APR: IRA Contribution/Roth/Tax Questions  
MAY: Long Term Care  
JUNE: Mid Year Outlook/Long Term Care Follow Up  
JULY: Life Insurance Review (Second To Die)  
AUG: Life Insurance Review Follow Up  
SEPT: Mortgages  
OCT: Required Minimal Distribution (RMD) Mortgages Follow Up  
NOV: Tax Selling/ Tax Harvesting/ RMD  
DEC: Balancing Gains/Losses/RMD/Rebalancing Portfolio  
JAN: Full Year Outlook/ Rebalancing Follow UP  
FEB: Disability  
MAR: Disability Follow Up  
APR: Tax Free Muni Review and Outlook  
MAY: Tax Free Muni Follow UP  
JUNE: 529 Intro For Children + Grandchildren  
JULY: 529 Follow-Up  
AUG: Estate Planning Trust  
SEPT: Estate Planning Trust Follow-up  
OCT: RMD  
NOV: RMD/Tax Selling  
DEC: Tax Selling/Rebalancing Portfolios