SUPERNOVA CONSULTING group LLC

24-Month Calendar Client Call Topics (Batch Process for Clients)

Director of Implementation is in charge of the 24-month calendar. He/she coordinates topic for the month. Preparation includes training the team the month before the topic and coordination with the home office. The 24-month calendar and call planning process will populate your agenda. Your executive summary will include actions taken, timeline and responsible party

Jan	Full Year Outlook
Feb	Review Beneficiaries
Mar	Follow up on review of beneficiaries
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	Liability management
Oct	Required Minimal Distribution (RMD) / Mortgages Follow-up
Nov	Tax selling / Tax Harvesting / RMD
Dec	Balancing Gains and Losses / RMD / Rebalancing Portfolios
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 Introduction for Children + Grandchildren / Mid Year Outlook
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

More topics can be downloaded from the Supernova Advanced Training Center.
(www.supernovaconsulting.com/members)
AVOID PRODUCT CONVERSATIONS EXCEPT WHERE NECESSARY, THESE CALL ARE MEANT TO BUILD A DEEPER CONNECTION TO YOUR CLIENTS