ATLAS FINANCIAL

Continuing Client Service Review Schedule

Life is in constant motion. As such, it is important to review clients' My Financial Atlas regularly. At Atlas Financial, we feel that scheduled reviews are imperative to make certain we are doing the maximum to assist clients. These reviews will focus on changes in client's goals, resources, and current laws to help clients maximize their resources while minimizing risks.

Our ongoing clients are welcome to call at any time regarding any matter. In addition, the following outlines our general focus on a quarterly basis:

First Quarter – Risk Management Review

- Life
- Disability
- Long Term Care (if applicable)
- Health
- Umbrella
- Property & Casualty

Second Quarter – Investment Planning

- Review Savings Goals
- Review Investment Allocation and Strategy
- Assess Risk Tolerance
- Review Education Funding
- Investment Education

Third Quarter – Goal Planning Review

- Review Family Goals
- Family Updates
- Asset Protection & Estate Planning Review

Fourth Quarter – Tax & Cash Flow Planning

- Income Tax Projection and Planning (in coordination with CPAs, if applicable)
- Cash Flow Planning & Review

Ongoing Services:

- Quarterly Investment Reporting (Loring Ward / Schwab)
- Access to Real-time Performance Reporting & Client Vault (BlueLeaf)
- On Demand Access to Financial Plan (MoneyGuidePro)
- Email and Phone Access