

DRIVEN

WEALTH MANAGEMENT

Driven Wealth Management - Sample Schedule of Monthly Services

January	February	March	April	May	June
Confirm saving's contribution amounts and automate.	Tax Reporting Forms Review	Update Retirement Projections and Financial Goals	Review Investment accounts, re-balance as needed.	Insurance Policy Review/ Check-In	Educational Funding & 529 Account Review
Spending Plan & Debt Review	Stock Market Outlook	IRA Contribution Check-In	Semi-Annual Live/Virtual Check-In	Tax Return Review	Credit Score and ID protection Review

July	August	September	October	November	December
Mid-Year Cash Flow Check-In	Stock Market Outlook	Career Progression Analysis	Semi-Annual Live/Virtual Check-In	End-Of-Year Tax Planning Review	Year end Review
Review Investment accounts, re-balance as needed.	Charitable/ Philanthropic Check-In	Employee Benefits Review	Review Investment accounts, re-balance as needed.	401(k) Election Review	Personal/ Professional Goal Setting

Legend:	Investments	Financial Planning	Tax-Related Planning	Personal Finance
----------------	-------------	--------------------	----------------------	------------------