

FREE RESOURCE

Annual Client Service Calendar

A month-by-month service rhythm so every client hears from you before they have to ask.

How to use this calendar

Map every client to a service tier, then schedule the year in advance. Reviews are booked before the year starts — not squeezed in when someone complains.

Annual rhythm — template

Month	Focus	Actions
January	Year kickoff	Annual review meetings begin; tax documents checklist sent
February	Tax prep	Cost-basis / 1099 questions handled; beneficiary review offers
March	Reviews continue	Mid-tier client reviews; prospect nurture touch
April	Tax deadline	Post-filing check-ins; Roth / contribution reminders
May	Relationships	Client appreciation touches; COI outreach
June	Mid-year reviews	Portfolio & goal check-ins for top tier
July	Planning	College / estate document nudges; team process review
August	Back to business	Prospect follow-up push; fall review scheduling
September	Fall reviews	Annual reviews round two; open-enrollment reminders
October	Year-end planning	Tax-loss harvesting; RMD reminders; gifting conversations
November	Gratitude	Thanksgiving touches; final review push
December	Close the year	Deadlines met; next year's calendar booked

Tiering rule

Top-tier clients: 2+ reviews per year plus proactive touches. Mid-tier: 1 annual review plus seasonal touches. Every client: no more than 6 months without meaningful contact.

Want this built into your practice?

Book a free practice operations assessment at ajghosh.com