

FREE RESOURCE

High-Net-Worth Service Calendar

A quarterly coordination rhythm for complex households — entities, concentration, and team alignment.

Who this is for

High-net-worth or complex households — concentrated positions, business interests, entities, multi-state issues. Their service is coordination as much as advice.

Annual rhythm

Quarter	Focus	Actions
Q1	Team alignment	CPA/attorney sync call; entity structure review; tax projection kickoff
Q2	Concentration review	Concentrated stock positions assessed; hedging/exit plan updated
Q3	Estate & giving	Trust funding verified; annual gifting executed; family meeting scheduled
Q4	Tax finale	Bunching strategy; Roth conversions; charitable vehicles funded; next-year calendar set

Coordination checklist

- ☐ Every professional on the team has the others’ current contact info — updated annually.
- ☐ One shared timeline for tax, legal, and planning deadlines. No silos.
- ☐ Family meeting held yearly with an agenda sent in advance.
- ☐ Estate documents confirmed funded — a signed trust that owns nothing is decoration.

The rule

For complex clients, your value is being the coordinator. If the CPA and the attorney are not talking, you are not done.

Want this built into your practice?

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