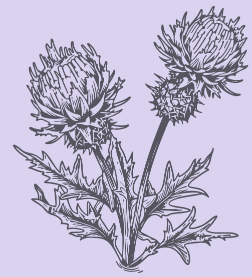
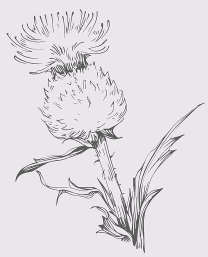
Thistle Wealth

Client Service Calendar

Ongoing Support

- Fiduciary support every step of the way.
- Unlimited phone calls, emails, texts, and individualized consultation.
- Semi-annual in-person review meetings with check in calls in-between meeting.



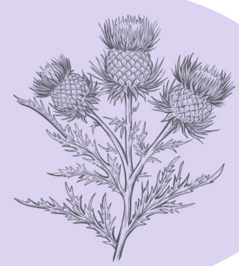


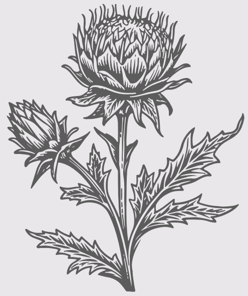
January March

- Financial Plan Update
- Safe Withdrawal Rates
- 1099's to CPA
- Potential Roth Conversions
- Retirement Account Funding
- Cash Flow Review
- Retirement Plan Review
- Allocation Check Up

April August

- Tax Return Review
- Tax Planning
- Beneficiary Review
- Estate Plan Review
- Witholdings Review
- Capital Gains Review





September December

- Required Minimum Distributions (RMD’s)
- Qualified Charitable Distributions (QCD’s)
- Social Security & Medicare Review
- Gifting Strategies & Planning
- Tax Loss Harvesting
- Roth IRA Conversion Implementation