

Wealth Planning Calendar for P&G Employees

Beyond Wealth

PARTNERS



POWERED BY SAVVY

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
<ul style="list-style-type: none"> • Earning Dates • Savings Plan Contribution Reset • Tax Planning 	<ul style="list-style-type: none"> • PG Dividend Payment Dates • Long-Term Incentive Program Awards 	<ul style="list-style-type: none"> • Tax Filing Preparation 	<ul style="list-style-type: none"> • Earning Dates • Tax Filing Preparation 	<ul style="list-style-type: none"> • PG Dividend Payment Dates 	<ul style="list-style-type: none"> • End of Fiscal Year: June 30th
JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
<ul style="list-style-type: none"> • Earning Dates • Annual PST Contribution 	<ul style="list-style-type: none"> • PG Dividend Payment Dates • Long-Term Incentive Program Awards • STAR Award 	<ul style="list-style-type: none"> • STAR Award 	<ul style="list-style-type: none"> • Earnings Dates • Benefits Open Enrollment • Long-Term Incentive Program Awards 	<ul style="list-style-type: none"> • PG Dividend Payment Dates • Benefits Open Enrollment • STAR Award 	<ul style="list-style-type: none"> • Tax Planning
Earnings Dates	Long-Term Incentive Program Awards	Savings Plan Contribution Reset	Tax Planning		

Earnings Dates	Long-Term Incentive Program Awards	Savings Plan Contribution Reset	Tax Planning
JANUARY, APRIL, JULY, OCTOBER	AUGUST	JANUARY	JANUARY
<ul style="list-style-type: none"> • Quarterly earnings released. • Ex-dividend dates fall in these months 	<ul style="list-style-type: none"> • Election emails released, with information regarding balance between restricted stock units and stock options. 	<ul style="list-style-type: none"> • At the turn of the calendar year, employees who maxed out their savings plan for the year prior may contribute again. • Consider outside IRA funding annually. 	<ul style="list-style-type: none"> • Examine withholdings from prior year and adjust as needed. • Consider charitable donations for calendar year. • Consider Traditional vs. Roth funding.
PG Dividend Payment Dates	STAR Award	Annual PST Contribution	End of Fiscal Year: June 30th

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FEBRUARY, MAY, AUGUST, NOVEMBER	AUGUST	JULY	JUNE 30TH
<ul style="list-style-type: none"> • PG's quarterly dividend payment dates. 	<ul style="list-style-type: none"> • Employees are notified of STAR award multiplier. 	<ul style="list-style-type: none"> • P&G makes it's annual contribution of stock to employee's PST Plan. Consider diversification options at this point annually once eligible at age 50. • Tax filing preparation. 	<ul style="list-style-type: none"> • Benefits Open Enrollment

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