



CAPITA COMPONENT PLANNING CALENDAR

www.capitafinancialnetwork.com

ANNUAL PLANNING PROJECTS

	Planning Components	Desired Outcome	Component Details
SESSION 1	Annual Kick Off	Ensure best possible planning experience for upcoming year	Organize meeting cadence. List planning components to be covered. Answer questions about the previous year.
SESSION 2	Comprehensive Annual Review	Review and refine the financial plan	Review of: cashflow, investments, tax strategy, life changes, net worth, goals, and family dynamics.
SESSION 3	Tax	Strategic tax decisions	Capita collaborates with your CPA for a year-end tax analysis with recommendations. Capita implements strategies.

ADDITIONAL PLANNING PROJECTS

A Look Into The Next Decade

Year 1

Define your priorities. Complete onboarding. Consolidate investments. Execute annual tax strategy. Build retirement plan.

Year 2

Estate Plan Kickoff: Help you articulate your money purpose and ensure your plan supports it.

Year 3

Insurance Review: Life, property, casualty, business buy/sell agreements, business succession, etc.

Year 5

Entity Organization: Ensure that Capita understands your entity ownership and tax structure.

Year 6

2nd Estate Plan Review: Review and discuss what you may want to change. Begin documenting a multigenerational wealth transfer plan.

Year 10

3rd Estate Plan Review.

