SHORE POINT ADVISORS

WEALTH MANAGEMENT

Annual Service Calendar

Winter Season / Goal Planning

Define Personal & Financial Goals
(short-, mid-, & long-term)

Align Investment & Saving Strategies
with updated goals & life changes

Spring Season / Portfolio Review

Evaluate Investment Performance
relative to benchmarks and goals

Discuss Personal Risk Tolerance & Current Allocation
to ensure proper diversification

Summer Season / Protection Planning

Review Estate Planning
and coordinate with estate planning attorney if necessary

Evaluate Current Liability Coverage
on all property & casualty insurance policies

Discuss Legacy and Beneficiary Designations
to reflect current wishes

Protect Family & Income
If insurances are deemed necessary

Fall Season / Tax Planning

Review Current-Year Income & Deductions
Final Tax Return Analysis

Plan for Tax Loss Harvesting
Capital Gains, QCDs, and other year-end strategies

Final Roth Conversions & Distribution Analysis
Reassessment & RMDs

Coordinate with CPA or Tax Professionals
to align strategies

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