



SPHYNX FINANCIAL PLANNING

CLIENT REVIEW CALENDAR

MONTHLY

Make note of any tax-deductible expenditures



Track budget and savings progress

Answer random questions

QUARTERLY / TRI-ANNUALLY

Adjust W4 withholding or make estimated tax payments

Review credit report and address any errors.

Rebalance portfolio



Address any major situational changes

ANNUALLY

Review and update insurance policies



Make changes to estate plan if necessary

Complete any tax planning tasks in advance of filing tax return
