

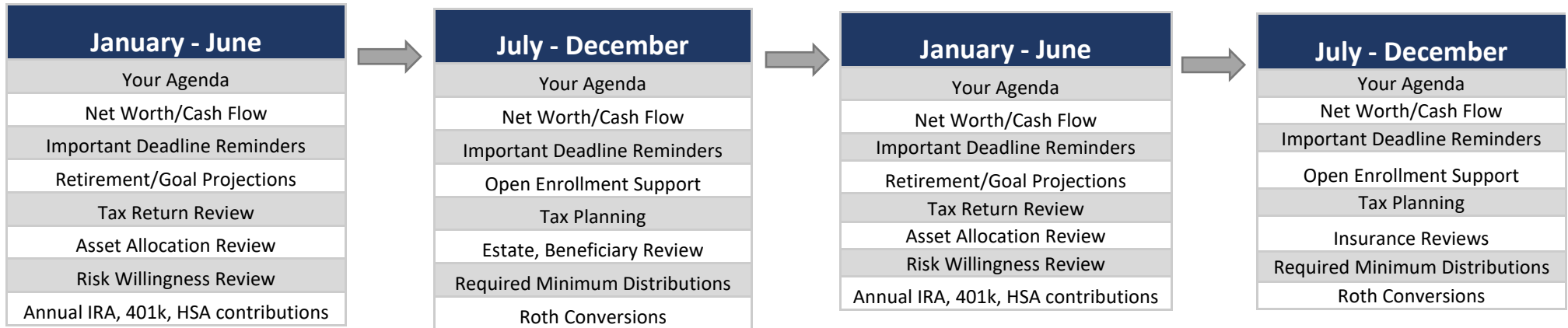


# PROVISION FINANCIAL PLANNING

## ONGOING CLIENT SERVICE CALENDAR

### YEAR 1

### YEAR 2



### Age Based Planning

Age	Planning
50	Eligible to make catch-up contributions
55	Eligible for HSA contribution catch up
59.5	Access to retirement accounts without penalty
60	Eligible to claim Social Security survivor benefits
62	Eligible to claim Social Security benefits at reduced rate
65	Eligible for Medicare
66-67	Full Retirement Age for Social Security
70	Maximum Social Security age reached
70.5	Eligible for Qualified Charitable Deductions
72	Required Minimum Distribution age

### Situational Planning Examples

Planning
SECURE Act
CARES Act - Stimulus #1
CAA - Stimulus #2
American Rescue Plan - Stimulus #3
Life Transition Support
Retirement
Marriage Changes
Births/Loss
Medical Changes
Job Changes
Windfall/Inheritance

\*Actual services will depend on client circumstances. This is for illustrative purposes only and subject to change.

