## LOTANO FINANCIAL GROUP OF GARDENS WEALTH MANAGEMENT WELLS FARGO ADVISORS FINANCIAL NETWORK

Justin Lotano, CRPC®, CDFA® Managing Director



## 2025 Financial Review Meeting Schedule

Q1	Q2	Q3	<b>Q</b> 4
<ul><li>Account Review</li><li>Net Worth Progress</li><li>External Account Review</li></ul>	<ul><li>Account Review</li><li>Plan Review</li><li>Estate Plan Strategy*</li></ul>	<ul><li>Account Review</li><li>Mid-year performance update</li><li>Protection Review</li></ul>	<ul><li>Account Review</li><li>Tax Efficient Planning</li><li>Plan Data Gathering</li></ul>
Date:			
Time:			
Place:			

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