



Service Calendar

Meet with Dan Andrews, CFP® each month to address both of these tracks to organize your Financial Life and also give you the chance to thrive!

Financial Planning Track

Work with a CERTIFIED FINANCIAL PLANNER™ to build your Personal Financial Foundation so you can manage your money responsibly. AKA: “Adulting” Help!

Personal Growth Track

Address your personal and professional development so you can increase your income while feeling more resilient during life’s challenges.

Month 1

Paperwork Organization

Gratitude Project

Month 2

Your Financial Summary

Goals & Rewards

Month 3

Budgeting

Career Skills Assessment

Month 4

Insurance

Mission & Vision

Month 5

Credit Score & Debt

Personal Branding

Month 6

Work Benefits & Retirement

Professional Documents

Month 7

Investments

Time Management

Month 8

Will & Estate Planning

Target Mood Distribution

Month 9

Tax Guidance

Networking & Relationships

Month 10

Money Personality

Proactive Planning

Month 11

Form Money Goals

Opportunity Creators

Month 12

Annual Review

Annual Review

