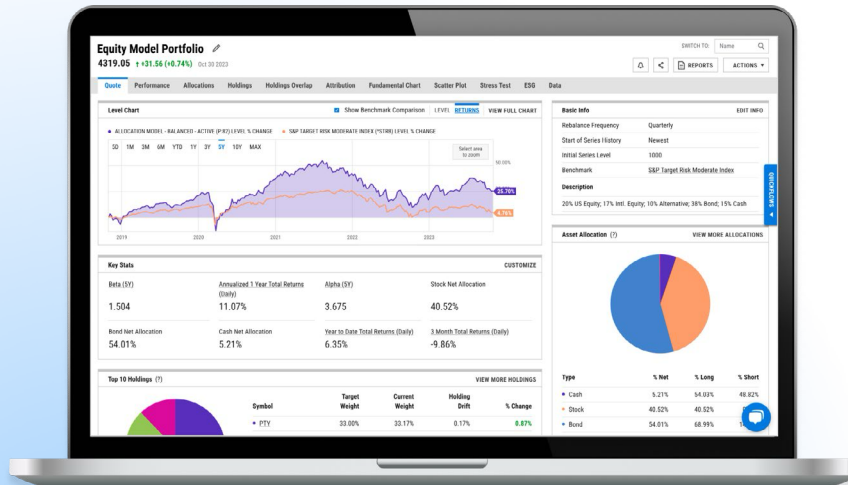


Summer Planning Checklist

Conversations to strengthen and expand client relationships for financial Advisors guiding midyear check-ins.

Midyear meetings are an opportunity to engage clients, build stronger relationships, and reinforce your value. A structured approach keeps discussions focused and uncovers key planning needs.

Use this checklist to guide timely conversations that show progress, engage the broader household, and strengthen client confidence. With YCharts, you can bring data to life, turning portfolio insights, performance trends, and planning scenarios into compelling visuals that drive better decisions.



Midyear Progress & Goal Alignment

- Review year-to-date performance in the context of 2025 objectives
→ **Tool Tip:** Use YCharts [Fundamental Charts](#) to visualize trailing returns and goal alignment
- Identify underperformers and evaluate current cash position
- Revisit client goals: What's changed? What's new?
- Confirm financial needs and spending plans for the remainder of the year
- Benchmark portfolios against relevant indices or model portfolios
→ **Tool Tip:** Leverage the [Excel Add-in](#) to compare performance and reallocation needs

Engage the Entire Household

- Use family meetings to introduce or revisit legacy planning conversations
→ Families often gather in the Summer, let this serve as a natural entry point
- Review and update account ownership and beneficiaries
- Ensure accounts are properly householded for a clear, consolidated view
→ **Tool Tip:** Use the [Householding and Proposal](#) tools to show the full picture
- Discuss how the family prefers to communicate across generations
→ YCharts visuals simplify strategies for collaborative discussions

Pressure-Test the Plan

- Walk through “what-if” market or macroeconomic scenarios
→ **Tool Tip:** Use the [Scenarios Tool](#) to model rate hikes, inflation, or downturns
- Reevaluate risk tolerance, especially if behavior or goals have shifted
→ **Tool Tip:** Use [Risk Profiles](#) to align strategy with current preferences
- Identify positions vulnerable to inflation, interest rates, or headline volatility
- Adjust allocations to reflect today’s outlook and tomorrow’s objectives

Reinforce the Foundation

- Review insurance coverages to confirm alignment with current goals and risks
- Discuss long-term care planning surrounding age, health, and family considerations
- Confirm emergency funding levels
- Identify gaps in protection that could impact overall financial stability
→ Not always exciting, but this reinforces your role as a trusted fiduciary



Let This Checklist Guide Your Summer Strategy

You have the conversations. Now bring them to life.

Use this midyear checklist to deepen relationships, uncover new opportunities, and guide smarter planning decisions through summer and beyond. What you discuss today will shape client confidence for the rest of the year.

Start your [free trial](#) to access the tools that help make these conversations more visual, compliant, and client-ready.