

Working with North Berkeley

# SAMPLE CLIENT CALENDAR

We engage with our clients and community regularly throughout the year. Our goal is to provide exceptional service and build community through regular relationship reviews, clear communication, and educational and social events. Below is a sample calendar of a year in the life as a North Berkeley client. Actual timing will vary depending on the start date of the client relationship.

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
Market Commentary	Client Investment Conference Call	Tax Notification	Market Commentary	Artist Reception	Client Appreciation Event
Quarterly Reports	Relationship Review	Client Appreciation Event	Quarterly Reports	Client Investment Conference Call	Planning Seminar
Artist Reception	Sponsored Event		Sponsored Event	Relationship Review	
JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Market Commentary	Planning Seminar	Solano Stroll	Market Commentary	Planning Seminar	Year-end Announcements
Quarterly Reports	Client Investment Conference Call	Client Appreciation Event	Quarterly Reports	Client Investment Conference Call	
Artist Reception	Relationship Review	<b>Annual Client Meeting</b>	Artist Reception	Relationship Review	
			Sponsored Event		