

# SMITH FAMILY 2013 PLANNING MAP FOR JOE AND LYNNE SMITH

PREPARED BY ROBERT FALVEY OF LEGACY WEALTH MANAGEMENT

TUESDAY, FEBRUARY 19, 2013

Completed 

Deleted 

In Progress 

Rescheduled 

Scheduled 

Tentative 

2/10/13  
to  
3/9/13

3/10/13  
to  
4/6/13

4/7/13  
to  
5/4/13

5/5/13  
to  
6/1/13

6/2/13  
to  
6/29/13

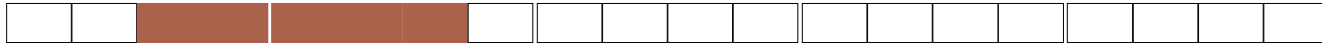
## Financial Independence

2/11/2013 3/1/2013



## Asset Allocation

3/1/2013 3/27/2013



## Family Legacy

4/15/2013 6/28/2013

