YETI Meeting Workflow(s)

(Broken into pre-YETI and YETI WFs)

Beginning 5 August 2024:

1. Announce in Aug and Sept Newsletters, but start scheduling in Sept through October (with overflow in Nov). (MJ & BO)
   a. Starting 19 Aug, begin individually reaching out to clients and asking them to schedule their meeting (MJ).
      i. Track clients scheduled via "2024 YETI Scheduled" tag in WB. (MJ)
      ii. Add "Sign up for YETI" task in RC, make it due 20 Aug for all but airline pilots—those should be 15 September. (MJ)
   b. Count number of meetings based on no more than 9 YETIs per week to leave room for prospect and pop-up meetings. (BO) *78 is estimate for 2024 starting 19 Sept.*
      i. Plan on whole day for Pensacola Clients and schedule those manually (MJ November?)
   c. Meeting Schedule ROE: (MJ)
      i. Monday: 1x YETI, Prospects, or YETI-reschedules
      ii. Tue-Thur: 3x max without confirmation from BO
      iii. Fri: 1x YETI, Prospects, or YETI-reschedules
      iv. Monitor each week as it starts to fill, query BO prior to going over 10 total meetings. Block windows if needed to preserve capacity. (MJ)
   d. Planning Schedule ROE: (MJ)
      i. Assign planning to either BP or MH (MJ)
      ii. Assign BO times each week to review/consolidate
2. Put 2024 YETI folder in main vault folder for all ongoing clients (MJ)
   a. Review how many still need to schedule weekly (MJ and BO)
3. Schedule planning 2 weeks prior, required uploads 3-weeks prior. (MJ)
   a. Check for uploads at 3-week and 2-week point. (MJ)
      i. If no uploads, by 2-week point, ask BO for a call on reschedule or allow the meeting. (MH)
         1. Communicate outcome to client (MJ)
4. As soon as meeting is scheduled:
   a. Assign planning responsibility to MH or BO (MJ)
   b. Review answers from Calendly to determine if client clarification is needed (MH/BO as assigned).

Weekly during YETI Season: The Monday meeting agenda will shift to a YETI focus clarifying who's doing what, process updates, and any other issues to make YETI meetings successful. A Friday meeting will be added to debrief the week and capture process updates as well as review any issues for the next week that might need action over the weekend by Brian.

Meeting Prep: These are the planning activities that we should be doing in planning sessions, ideally 2 weeks out.

1. Make a new Pinned "YETI 2024" (Pinned YETI Note = PYN) Note in WB for client if not already present (Assigned planner 2')
2. HP: Confirm that prior year (2023) Tax return is uploaded into HP. If not, seek the return and upload it. (2')
3. Review Family's Calendly YETI Signup for question responses (Assigned Planner 2')
4. Review recent emails for actions needed, note in PYN (Assigned planner 5')
5. Review Key Note for context / issues to raise, note in PYN (Assigned planner 2')
6. Review last meeting notes for key items to address, note in PYN (Assigned planner 2')
7. If we manage client accounts: BRIAN OR MICHELLE MUST DO THIS (Can largely be done in bulk now).
   a. Review for cash or rebalancing, rebalance if needed. (BO 5')
   b. Review for current year tax-related activity, note in PYN (BO 5')

      i. Roth Conversions

      ii. IRA Contributions

      iii. BDRs

      iv. Solo 401(k) contributions

      v. RMDs

      vi. QCDs

      vii. Approximate Div's YTD

      viii. **Approximate CG's YTD**

    c. Ensure Capitect is set up and ready to review on screen during meeting if needed. Only print performance if client has asked about it. (BO 5')

8. Review WB tasks for actions needed, note in PYN (Assigned planner 2')
9. Review RC tasks for actions needed, note in PYN (Assigned planner 2')
10. Review / DNLD recent client updates to RC folders (Assigned planner 5')
11. Review all client provided documents
    a. Pay, Income, Taxes, Deductions: Extrapolate and enter into WWMFP Tax Projection Tool (version 2.0 CAO Sept 2024).
      i. Master copy located at folder "2-New Client Forms" (Assigned planner).
      ii. Create copy of Master and save as with client's last name in client's "4-Tax" folder under calendar year.
      iii. Make updates in RC as needed (add date of review (MM/YY) to RC cards to show activity)
    b. Build HP Projection "2024 as of MM/YY" (Assigned planner)
      i. Run Tax Report & Range Calc
        1. Check for proximity to thresholds, status of deductions/credits
      ii. Note issues in PYN
    c. Build 2025 HP Projection if the family is known to have a major change in the next year. (Assigned planner 5')
    d. Update HP Tax Letter (Backdoor Roth IRA, Roth Conversion, Any issue to communicate to Tax Pro) (Assigned planner – 3')
12. Review client age for age milestones, note issues in PYN (Assigned planner 2')
13. Review YETI from the previous year for opportunities/expected tax outcomes (Assigned planner 3')
14. Update Tags- remove outdated, add any new (Assigned Planner 2')
15. Review & update in RC (Assigned Planner 5-10'):
    a. Family (kid changes? State change?)
    b. Income
    c. Expenses
    d. Savings
    e. Goals
    f. Net Worth (focus on possible client-made change to accounts, duplicate accounts, ownership)
      i. Update account information if needed
16. Build P360 YETI Shell (Assigned Planner 10-15')
    a. In P360 Start a "Review" on the date of the meeting, then use the YETI as the template.
    b. Note issues in PYN, or record a Loom for BO
    c. Copy to Word
      i. Update family name to Spouse 1 and Spouse 2 LastName
      ii. Update date to Month YYYY
      iii. ***Update spacing of bullets to 1.5***
      iv. Delete N/A fields unless it's a new family / first-time YETI