MarketDesk

Quarterly Checklist

Portfolio Management & Growing Your Practice

The below checklist from MarketDesk is a roadmap to organize the suggested quarterly activities and ensure you get the full benefit of the MarketDesk Platform. For each activity, our team included a time estimate and classified the activity as either "Portfolio Management" or "Growing Your Practice".

Week 1 of the Quarter

- ☐ [Portfolio] Read the Quarterly Asset Allocator's Guide (1.5 hours)
- ☐ [Portfolio] Review ETF Asset Allocation Models & Portfolio Commentary (30 minutes)
- ☐ [Growth] Distribute the Quarterly Letter to Clients and Prospects (30 minutes)
- ☐ [Growth] Print out the Market Talking Points for Client Conversations (2 minutes)

Weeks 2-4

- ☐ [Portfolio] Listen/Read the Weekly Research Summary each Friday Morning (1 hour)
- ☐ [Growth] Host a Quarterly Webinar with the Prebuilt Slides & Script (1 hour)
- ☐ [Growth] Share the Chart of the Month on Your Website and Social Media (15 minutes)

Week 5 (i.e. 1st Week of 2nd Month)

- ☐ [Portfolio] Review ETF Asset Allocation Models & Portfolio Commentary (30 minutes)
- ☐ [Portfolio] Listen/Read the Monthly Roundup of Key Research Highlights (30 minutes)
- ☐ [Growth] Distribute the Monthly Letter to Clients and Prospects (30 minutes)
- ☐ [Growth] Print out the updated Market Talking Points for Client Conversations (2 minutes)

Weeks 6-8

- ☐ [Portfolio] Listen/Read the Weekly Research Summary each Friday Morning (1 hour)
- ☐ [Growth] Share the Chart of the Month on Your Website and Social Media (15 minutes)

Week 9 (i.e. 1st Week of 3rd Month)

- ☐ [Portfolio] Review ETF Asset Allocation Models & Portfolio Commentary (30 minutes)
- ☐ [Portfolio] Listen/Read the Monthly Roundup of Key Research Highlights (30 minutes)
- ☐ [Growth] Distribute the Monthly Letter to Clients and Prospects (30 minutes)
- ☐ [Growth] Print out the updated Market Talking Points for Client Conversations (2 minutes)

Weeks 10-12

- ☐ [Portfolio] Listen/Read the Weekly Research Summary each Friday Morning (1 hour)
- ☐ [Growth] Share the Chart of the Month on Your Website and Social Media (15 minutes)

Portfolio Management

Total hours each quarter: 10

- ✓ Stay Up-to-date on Market Risks & Opportunities
- ✓ Rebalance ETF Asset Allocation Models
- ✓ Active Risk Management
- ✓ Market Noise Distilled into Client Talking Points

Growing Your Practice

Total hours each quarter: 3-5

- ✓ 1 Webinar Presentation for Clients & Prospects
- ✓ 1 Quarterly Letter
- ✓ 2 Monthly Letters
- ✓ 3 Charts of the Month