

## 2011 Borchers Law Calendar of Events

Estate Protection Review & Refinement™ / PlanCheck™ / ILITServe™ (Crummey Trust Administration) programs

January	February	March	April	May	June
R&R Phone calls and Meetings  Annual Billing for R&R and PlanCheck™	R&R Phone calls and Meetings	R&R Phone calls and Meetings	[no activity planned]	Wed. MAY 4 at 3pm and 7pm <b>RECENT DEVELOPMENTS BRIEFING *</b>  R&R Phone calls and Meetings	R&R Phone calls and Meetings  Summertime Cape and Lakes Seminars
July	August	September	October	November	December
R&R Phone calls and Meetings  Summertime Cape and Lakes Seminars	R&R Phone calls and Meetings	R&R Phone calls and Meetings	[no activity planned]	Thurs. NOV. 10 at 6:30pm <b>DINE &amp; LEARN EVENT *</b>  R&R Phone calls and Meetings  ILIT Crummey Notices and billing	R&R Phone calls and Meetings  Return Crummey Notices to Office

\* Location of the event (likely to be in the MetroWest area) to be announced.

## 2012 Borchers Law Calendar of Events

Estate Protection Review & Refinement™ / PlanCheck™ / ILITServe™ (Crummey Trust Administration) programs

January	February	March	April	May	June
R&R Phone calls and Meetings  Annual Billing for R&R and PlanCheck™	R&R Phone calls and Meetings	R&R Phone calls and Meetings	[no activity planned]	Wed. MAY 2 at 3pm and 7pm <b>RECENT DEVELOPMENTS BRIEFING *</b>  R&R Phone calls and Meetings	R&R Phone calls and Meetings  Summertime Cape and Lakes Seminars
July	August	September	October	November	December
R&R Phone calls and Meetings  Summertime Cape and Lakes Seminars	R&R Phone calls and Meetings	R&R Phone calls and Meetings	[no activity planned]	Thurs. NOV. 1 at 6:30pm <b>DINE &amp; LEARN EVENT *</b>  R&R Phone calls and Meetings  ILIT Crummey Notices and billing	R&R Phone calls and Meetings  Return Crummey Notices to Office

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2011 new PlanCheck™ clients: Your first telephone check up will take place in 2014.  
2012 new PlanCheck™ clients: Your first telephone check up will take place in 2015.