

Notifications.



Notifications

Unread (8) Read (138) Settings

Notification Settings

- ☒ Client completes or edits a survey
- ☒ Upcoming client birthdays
- ☒ Upcoming client milestones (e.g. *IRA Distribution Eligibility*)
- ☒ Upcoming relevant dates (e.g. *Tax Filing Deadlines*)

Custom Alerts

Creating custom alerts helps you stay engaged with clients.

Create new alert

Jane Doe: Jane's son Dylan's 18th birthday	10/10/2018
Bob Clientname: Spending Goal - Kitchen upgrade in 2020	02/14/2019
Steve Climber: Steve turns 62 next month. Remember to review Steve's SS opti...	05/14/2019
Jane Doe: email client about Johnny turning 16 and how to prepare for college	11/28/2019
Melissa Sanderson: Melissa turns 62 soon. Remember to review her SS options...	01/01/2020
Jane Doe: Call client about Suzie turning 16 and how to prepare for college	05/12/2020

Update Settings

Upcoming (2)



2018 Federal Tax Forms Due
April 15, 2019 – 26 days from now



2018 Federal Tax Extension Due
October 15, 2019 – 48 days from now

Recent (58)



Jean Davis edited their **profile**
July 16th – 2 days ago



Stacie Thompson's 49th birthday
July 11th – 5 days ago

Mark as Read



Mark Roberts completed the **Estate Planning** survey
May 3rd – 138 days ago



Steve Climber hit their **Giving to Family** goal
April 13th – 155 days ago



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