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| 6. RELATIONSHIP MANAGEMENT |

Client Relationship Management Calendar

INSTRUCTIONS: List your Top 10 Clients and the activities you will do over the next 12 months to manage the relationship.

RV Relationship Visit, SR Stewardship Report, RE Relationship Event, CR Claims Review, CM Continuation Meeting, TL Trusted Advisor Luncheon, NE Networking Event, BC Birthday Card, X X-Date

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| **Client** | **Jan** | **Feb** | **Mar** | **Arp** | **May** | **Jun** | **Jul** | **Aug** | **Sep** | **Oct** | **Nov** | **Dec** |
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