

Summary Report

01/01/2023 – 01/31/2023



TOTAL HOURS

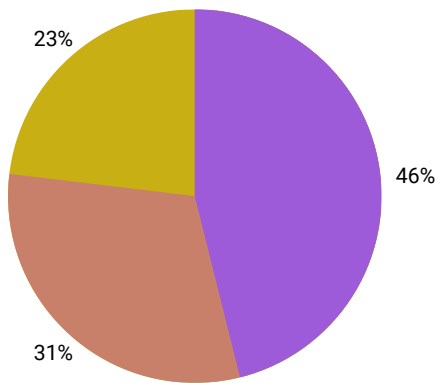
4:20:00

BILLABLE HOURS

4:20:00

AMOUNT

433.33 USD

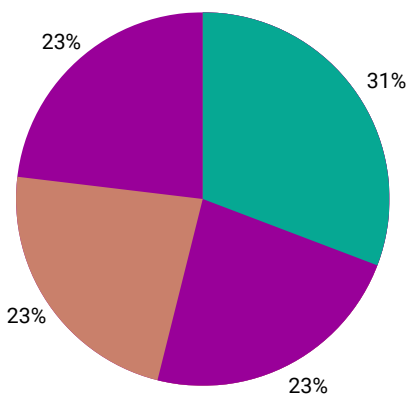


PROJECT

- Client A Financial Planning • Advisor, Joanna Q
- Client B Financial Planning • Advisor, Joanna Q
- Client C Financial Planning • Advisor, Joanna Q

DURATION

- 2:00:00
- 1:20:00
- 1:00:00



TIME ENTRY

- Digest client meeting notes and emails, build goals and starting retirement scenario
- Review tax projections
- Meeting to discuss new client needs
- Initial document processing and MGP setup

DURATION

- 1:20:00
- 1:00:00
- 1:00:00
- 1:00:00

PROJECT - TIME ENTRY	DURATION	AMOUNT	PERCENTAGE
<ul style="list-style-type: none"> ● Client A Financial Planning • Advisor, Joanna Q 	2:00:00	200.00 USD	46.15%
Initial document processing and MGP setup	1:00:00	100.00 USD	23.08%
Meeting to discuss new client needs	1:00:00	100.00 USD	23.08%
<ul style="list-style-type: none"> ● Client B Financial Planning • Advisor, Joanna Q 	1:20:00	133.33 USD	30.77%
Digest client meeting notes and emails, build goals and starting retirement scenario	1:20:00	133.33 USD	30.77%
<ul style="list-style-type: none"> ● Client C Financial Planning • Advisor, Joanna Q 	1:00:00	100.00 USD	23.08%
Review tax projections	1:00:00	100.00 USD	23.08%