

## 3.1 Financial Planning Approach

**Date:** [Enter Date Created or Edited]

**Person Responsible:** [Title of Person Responsible]

**Frequency:** [Indicate when this Task is Initiated]

**Process:**

1. Begin to
2. Document your
3. Process here.

**Scripting:** [If Applicable]

**Resources:**

Include reference to any letters, forms, documents, [items in shared drives](#), links, websites, software programs, manuals and/or individuals or departments required to complete this task.

 Use your CRM to fully automate as much of this process as possible.

→ Use live links for instant access to intranet/internet sources for online manuals and procedures.