Your Personal Strategy Tracker

**Prepared for:** Mr. & Mrs. Client

**Prepared by:** Mr. Advisor, Financial Advisor

ABC Wealth Management

**Date:** Today

**Cashflow Planning**

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|  | **Strategy** | **Date Last Reviewed** |
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**Tax Planning**

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|  | **Strategy** | **Date Last Reviewed** |
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**Retirement Planning**

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|  | **Strategy** | **Date Last Reviewed** |
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**Investment Strategies**

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|  | **Strategy** | **Date Last Reviewed** |
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**Family Security**

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|  | **Strategy** | **Date Last Reviewed** |
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**Caring for Others**

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|  | **Strategy** | **Date Last Reviewed** |
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**Your Legacy**

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|  | **Strategy** | **Date Last Reviewed** |
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**Business Planning & Succession**

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|  | **Strategy** | **Date Last Reviewed** |
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**Other Important Information:**