

# *Annual Review Process Worksheet*

**STAGE 1: PRE CLIENT REVIEW** (All reviews are to be conducted with both spouses)

Step

Activity

Timescale

Responsibility

Tools

*Advise Better*  
*Live Better*

# *Annual Review Process Worksheet*

## **STAGE 2: PREPARATION OF REVIEW DOCUMENTATION**

Step

Activity

Timescale

Responsibility

Tools

*Advise Better*  
*Live Better*

# Annual Review Process Worksheet

**STAGE 3: CLIENT REVIEW & FOLLOW UP** (Meeting will last up to    hr(s) + additional    min for meeting notes)

Step

Activity

Timescale

Responsibility

Tools

*Advise Better*  
*Live Better*