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|  | Discovery planning  Planning category report |

\* Elicit specifics during the course of the meeting if the client doesn’t provide this information by filling out a discovery planning survey before the meeting.

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| **Name** |  |
| **Age\*** |  |
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| **Assets\*** |  |
| **Liabilities\*** |  |

Category: tax

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| **Observations** | **Ideas** | **Other comments** |
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Category: financial

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| **Observations** | **Ideas** | **Other comments** |
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Category: retirement

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| **Observations** | **Ideas** | **Other comments** |
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Category: estate planning

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| **Observations** | **Ideas** | **Other comments** |
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Category: succession/exit

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| **Observations** | **Ideas** | **Other comments** |
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Category: other

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| **Observations** | **Ideas** | **Other comments** |
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