

A photograph of a winding asphalt road with double yellow lines, curving through a dense forest with trees displaying vibrant autumn foliage in shades of yellow, orange, and red. The road is bordered by a white line on the right side.

Clarity Action Plan

LIVING WITH CLARITY™

PREPARED FOR:

PRESENTED BY:

DATE:

RECOMMENDATIONS

Status  = Move Ahead  = Planning to, but not right now  = Decline at this time



Comments:



Comments:



Comments:



Comments:



Comments:

NOTES**PLEDGE OF INTENT**

Client Signature: _____ Date: _____

Client Signature: _____ Date: _____

Advisor Signature: _____ Date: _____



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