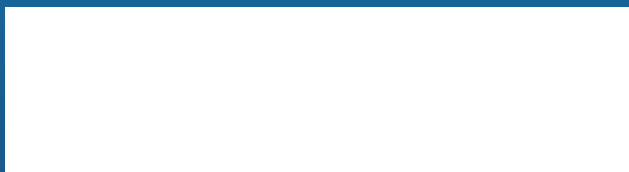


A large graphic of a sunburst with white rays radiating from a central white circle against a blue background. The rays extend across the top and sides of the page.

ECHO TAKE ACTION PLAN



To assist you with integrating the ECHO program content in your business, we have designed this Take Action Plan.

ECHO Take Action Plan

1. Identify your top 3 goals for integrating ECHO into your business.

1. _____
2. _____
3. _____

2. Identify obstacles that will get in the way of your goals. What solutions will help you overcome these obstacles?

OBSTACLE

1. _____

OBSTACLE

2. _____

OBSTACLE

3. _____

SOLUTIONS

1. _____

SOLUTIONS

1. _____

SOLUTIONS

1. _____

2. _____

2. _____

2. _____

3. _____

3. _____

3. _____

3. Client/Prospect Identifier – Identify your top 5 existing client relationships and top 5 prospects that you will contact in the next 45 days for a Generational Wealth approach meeting.

CLIENT NAME

1. _____

2. _____

3. _____

4. _____

5. _____

FIRST ACTIONS

1. _____

2. _____

3. _____

4. _____

5. _____

PROSPECT NAME

1. _____

2. _____

3. _____

4. _____

5. _____

FIRST ACTIONS

1. _____

2. _____

3. _____

4. _____

5. _____

ECHO Take Action Plan

4. Within 30 days of completing the ECHO course, fill out the Legacy Questionnaire. Have your spouse (if applicable) fill it out as well. Enter your responses into Qualitate™ to generate reports and first draft of your Family Financial Philosophy.

Please sign below that you commit yourself to integrating what you have learned.

Signed: _____

Dated: _____