

TEAM PROFILE FOR _____

<i>name</i>	<i>name</i>	<i>name</i>	<i>name</i>
_____	_____	_____	_____
<i>role</i>	<i>role</i>	<i>role</i>	<i>role</i>

<i>name</i>	<div style="border: 1px solid white; padding: 10px; display: inline-block;"> <i>The</i> PLANNING <i>Table</i> </div>	<i>name</i>
<i>role</i>		<i>role</i>
<i>name</i>		<i>name</i>
<i>role</i>		<i>role</i>
<i>name</i>		<i>name</i>
<i>role</i>		<i>role</i>

_____	_____	_____
<i>client name</i>	<i>client name</i>	<i>most trusted advisor</i>

When faced with a challenging financial situation, who do you contact? _____

Team Member	Responsibility	Referral Source
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____