

**1. Target Date**  
(within 12 months):

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**2. What does success look like on this date?**  
(X revenue based on Y AUM, X client meetings per week, X number of new clients, etc.)

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**3. What area of business does this touch?**  
(client service, back-office operations, investment management, etc.)

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**4. How do we hold stakeholders accountable?**  
(weekly meetings, rolling note sheet, monthly tracking)

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**Please list up to three activities per section**



