	Prep Process										
	CSA	CSA	CSA	Advisor 2	Advisor 1	Advisor 2	CSA	Advisor 2	CSA	Advisor 2	Associate Advisor
Household	Scheduling Invite Sent	Reminder Email Sent	Meeting Date	Meeting Materials Prepped	Meeting Materials Reviewed	Inadaption Tax Letter	2021 Tax Return uploaded to Inadaption	2021 Tax Return reviewed	Insurance Documents Received	Insurance Documents Reviewed	Notes
-----	Yes	Yes	10/04/2022	Yes	Yes	Ready for Review	Yes	Yes	Yes	Yes	-
-----	Yes	No	10/07/2022	Yes	Yes	Ready for Review	No	Yes	Yes	Yes	-
-----	No Meeting	N/A	No Meeting	No Meeting	No Meeting	Ready for Review	No	Yes	Yes	Yes	-
-----	Yes	Yes	10/04/2022	Yes	Yes	No	Yes	Yes	Yes	Yes	-
-----	Yes	Yes	11/16/2022	Yes	No	No	No	No	No	No	-
-----	Yes	Yes	11/7/2022	No	No	No	Yes	No	No	No	-
-----	Yes	No	10/12/2022	Yes	Yes	No	Yes	Yes	Yes	Yes	-
-----	Yes	No	10/7/2022	Yes	Yes	No	Yes	No	Yes	Yes	-
-----	Yes	No	11/3/2022	Yes	No	No	Yes	No	No	No	-
-----	Yes	Yes	10/06/2022	Yes	No	No	Yes	No	No	No	-
-----	Yes	Yes	11/2/2022	Yes	No	No	Yes	Yes	Yes	Yes	-
-----	No Meeting	N/A	No Meeting	No Meeting	No Meeting	No	Yes	No	No	No	-
-----	Yes	Yes	11/7/2022	Yes	No	No	Yes	Yes	Yes	No	-
-----	Yes	No	9/28/2022	Yes	Yes	No	Yes	Yes	Yes	Yes	-
-----	Yes	No	8/02/2022	Yes	Yes	No	No	Yes	Yes	Yes	Auto - $200 ded; Add college grant or parents CDs? upload new TIAA statement check on TIAA pension/lump sum balance
-----	Yes	Yes	11/2/2022	No	No	No	No	No	No	No	-
-----	Yes	No	11/3/2022	Yes	No	No	Yes	Yes	Yes	Yes	-
-----	Yes	Yes	11/14/2022	No	No	No	No	No	No	No	-
-----	Yes	Yes	11/3/2022	No	No	No	No	No	No	No	-
-----	Yes	Yes	11/14/2022	No	No	No	No	No	No	No	-
-----	Yes	Yes	Email	No	No	No	No	No	No	No	-
-----	Yes	No	10/12/2022	Yes	Yes	Ready for Review	Yes	Yes	Yes	Yes	-
-----	Yes	Yes	10/4/2022	No	No	No	No	No	No	No	-
-----	Yes	No	10/03/2022	Yes	Yes	Ready for Review	Yes	Yes	Yes	Yes	-
-----	No Meeting	N/A	No Meeting	No Meeting	No Meeting	No	No	No	No	No	-
-----	No Meeting	N/A	No Meeting	No Meeting	No Meeting	No	No	No	No	No	-
-----	Yes	Yes	11/2/2022	Yes	No	No	Yes	Yes	Yes	Yes	LTC Quote requested; increase auto ded from $500 to $1000; verify umbrella & rent premium. Disability benefit initiated. Voluntary life increased to $384/yr
-----	Yes	Yes	10/27/2022	Yes	No	No	No	No	No	No	-
-----	Yes	Yes	11/2/2022	Yes	No	No	No	No	No	No	-
-----	Yes	Yes	11/3/2022	No	No	No	No	No	No	No	-
-----	Yes	Yes	11/14/2022	No	No	Ready for Review	Yes	Yes	Yes	Yes	-
-----	Yes	Yes	11/3/2022	No	No	No	Yes	Yes	Yes	Yes	LTC Quote requested
-----	Yes	No	10/4/2022	Yes	Yes	No	Yes	Yes	Yes	Yes	-
-----	Yes	Yes	No	No	No	No	No	No	No	No	-
-----	Yes	No	10/4/2022	Yes	Yes	No	Yes	Yes	Yes	Yes	Auto - $200 ded; Confirm adult group life amount in addition to 2x salary; Life policies coming up on 20years; Home increased from $2080 to $3124?
-----	Yes	No	10/07/2022	Yes	Yes	No	Yes	Yes	Yes	Yes	-
-----	Yes	No	10/3/2022	Yes	Yes	No	Yes	Yes	No	No	-
-----	Yes	Yes	10/14/2022	Yes	Yes	No	Yes	Yes	Yes	Yes	-
-----	No Meeting	N/A	No Meeting	No Meeting	No Meeting	No	Yes	Yes	Yes	Yes	-
-----	Yes	No	9/27/2022	Yes	Yes	No	Yes	No	Yes	Yes	-
-----	Yes	Yes	11/14/2022	Yes	No	No	Yes	Yes	Yes	Yes	-
-----	Yes	Yes	11/14/2022	Yes	No	No	Yes	Yes	Yes	No	-
-----	Yes	No	10/03/2022	Yes	No	No	Yes	Yes	Yes	Yes	-
-----	Yes	Yes	10/07/2022	Yes	Yes	No	Yes	Yes	Yes	Yes	-
-----	Yes	Yes	10/03/2022	Yes	No	No	No	No	No	No	-
-----	Yes	No	8/31/2022	Yes	Yes	No	Yes	Yes	Yes	Yes	Ark. 3.16% as of 8/29. Need insurance declarations; Estimated pmts not necessary for 2022
-----	Yes	Yes	10/3/2022	No	No	No	No	No	No	No	-
-----	Yes	No	10/4/2022	Yes	Yes	No	No	No	No	No	-
-----	Yes	Yes	10/07/2022	Yes	No	No	Yes	No	Yes	No	-
-----	Yes	No	10/19/2022	Yes	No	Ready for Review	Yes	Yes	Yes	Yes	-
-----	Yes	No	10/14/2022	Yes	Yes	No	No	No	No	No	-
-----	Yes	No	9/28/2022	Yes	Yes	Ready for Review	Yes	Yes	Yes	Yes	Amended 2021 Tax Return; Assess RMD - QCDR; HF Savings; Roth conversion
-----	Yes	Yes	10/04/2022	Yes	Yes	No	Yes	No	Yes	Yes	-
-----	Yes	Yes	11/20/2022	Yes	No	Ready for Review	Yes	Yes	Yes	Yes	-
-----	Yes	No	10/04/2022	Yes	No	Ready for Review	Yes	Yes	No	No	LTC Quote requested
-----	Yes	Yes	10/13/2022	Yes	Yes	No	Yes	Yes	Yes	Yes	-
-----	Yes	Yes	Email	No	No	No	No	No	No	No	-
-----	Yes	No	10/21/2022	Yes	Yes	Ready for Review	Yes	Yes	Yes	Yes	-
-----	Yes	No	8/3/2022	Yes	Yes	No	Yes	Yes	Yes	Yes	Increase deductible from $500 to $2500 on auto; Send Shackelwaite group life and disability
-----	Yes	No	10/08/2022	Yes	No	No	No	No	No	No	-
-----	Yes	Yes	Email	No	No	No	No	No	No	No	-
-----	Yes	No	9/27/2022	Yes	Yes	No	Yes	Yes	Yes	Yes	-
-----	Yes	Yes	10/04/2022	Yes	No	No	Yes	Yes	Yes	Yes	-
-----	Yes	Yes	10/18/2022	Yes	No	Ready for Review	Yes	Yes	Yes	Yes	-
-----	Yes	Yes	11/17/2022	Yes	No	No	No	No	No	No	-
-----	No Meeting	N/A	No Meeting	No Meeting	No Meeting	No	No	No	No	No	-
-----	No Meeting	N/A	No Meeting	No Meeting	No Meeting	No	No	No	No	No	-
-----	No Meeting	N/A	No Meeting	No Meeting	No Meeting	No	No	No	No	No	-
-----	Yes	Yes	9/26/2022	Yes	Yes	No	Yes	Yes	Yes	Yes	-
-----	Yes	Yes	10/19/2022	Yes	No	Ready for Review	Yes	Yes	Yes	Yes	-
-----	Yes	No	10/13/2022	Yes	Yes	Ready for Review	Yes	Yes	Yes	Yes	Grandparent trap eliminated; RMD (QCDR); 3M offer - stick w/ 3M or take some Hexgard?; Promissory note; Why is Max not updated since Feb 2022
-----	Yes	Yes	10/18/2022	Yes	No	Ready for Review	Yes	Yes	No	No	-
-----	Yes	Yes	No	No	No	No	No	No	No	No	-
-----	Yes	No	8/31/2022	Yes	Yes	No	Yes	Yes	No	Yes	Baby; New Home; Update beneficiary on Trust after baby is born; Upload disability information; Home Insurance - Dwelling coverage of $300,000; Add umbrella
-----	Yes	Yes	No	No	No	No	Yes	No	Yes	No	-
-----	Yes	No	10/4/2022	Yes	Yes	No	Yes	Yes	Yes	Yes	-
-----	Yes	Yes	9/29/2022	Yes	Yes	No	Yes	Yes	Yes	Yes	-
-----	Yes	No	11/3/2022	Yes	No	No	Yes	Yes	Yes	Yes	-
-----	Yes	Yes	10/4/2022	Yes	Yes	No	No	No	No	No	-
											-
											-
											-
	79	Households	79	84.13%	46.10%	18.99%	59.49%	50.63%	21.90%	46.84%	-
		Invites (inc pre-s	71	66	43	15	47	40	43	37	-
		Scheduled	40	40	43	79	79	79	79	79	-

	Pre-Surge	4
8	1 - Sept 26-30	6
14	2 - Oct 3-7	9
8	3 - Oct 10-14	2
8	4 - Oct 17-21	7
14	5 - Oct 24-28	10
10	6 - Oct 31-Nov 4	6
14	7 - Nov 14-18	7
	Email	2
79	Total Scheduled	54

Scheduled
Email Meeting
Total Response

	In Meeting	Lead	Solo
Pre-Surge	3	3	3
Week 1	4	2	2
Week 2	9	4	0
Week 3	2	0	0
Week 4	7	7	7
Week 5			
Week 6			
Week 7			
Totals	27	16	12

	In Meeting	Lead	Solo
Pre-Surge	1	1	1
Week 1	4	4	0
Week 2	9	5	0
Week 3	2	2	0
Week 4	0	0	0
Week 5			
Week 6			
Week 7			
Totals	16	12	1

	Prep Process										
	CSA	CSA	CSA	Advisor 2	Advisor 1	Advisor 2	CSA	Advisor 2	CSA	Advisor 2	Associate Advisor
Household	Scheduling Invite Sent	Reminder Email Sent	Meeting Date	Meeting Materials Prepped	Meeting Materials Reviewed	Holdiption Tax Letter	2021 Tax Return uploaded to Holdiption	2021 Tax Return reviewed	Insurance Documents Received	Insurance Documents Reviewed	Notes

	Prep Process										
	CSA	CSA	CSA	Advisor 2	Advisor 1	Advisor 3	CSA	Advisor 2	CSA	Advisor 2	Associate Advisor
Household	Scheduling Invite Sent	Reminder Email Sent	Meeting Date	Meeting Materials Prepped	Meeting Materials Reviewed	Invitation Tax Letter	2021 Tax Return uploaded to Invitation	2021 Tax Return reviewed	Insurance Documents Received	Insurance Documents Reviewed	Notes