TANDEM
Financial Team LLC

Your Next Steps

A personalized plan for what needs attention now, what we'll work through soon, and what can wait.

Client/Family:_____ Date:_____ Tandem Advisor:_____

NOW

Items that need attention or affect immediate financial stability.

Next Step	Who's Handling It	Target	Status/Notes
	Tandem I You I Attorney I CPA I Other		
	Tandem I You I Attorney I CPA I Other		
	Tandem I You I Attorney I CPA I Other		
	Tandem I You I Attorney I CPA I Other		

SOON

Important items we'll work through over the coming weeks and months.

Next Step	Who's Handling It	Target	Status/Notes
	Tandem I You I Attorney I CPA I Other		
	Tandem I You I Attorney I CPA I Other		
	Tandem I You I Attorney I CPA I Other		
	Tandem I You I Attorney I CPA I Other		

LATER

Decisions that can safetly wait until you are ready.

Next Step	Who's Handling It	Target	Status/Notes
	Tandem I You I Attorney I CPA I Other		
	Tandem I You I Attorney I CPA I Other		
	Tandem I You I Attorney I CPA I Other		
	Tandem I You I Attorney I CPA I Other		
	Tandem I You I Attorney I CPA I Other		

WAITING ON

TANDEM IS HANDLING FOR YOU

Not sure where something belongs? Start with us. You don't have to know which company, professional, or department to call. Reach out to your Tandem team we'll help determine the next step.