

# Profectus Pathways - SAMPLE

Task Name	Status	Professional Category	Assigned To	% Complete	Notes	2018				2019				2020				2021			
						Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>Path to Profectus - SAMPLE Client</b>																					
<b>Protection</b>																					
<b>Property &amp; Casualty</b>																					
Auto Insurance																					
Recommendation	Not Started	P&C Agent							06/30/18												
Homeowners Insurance																					
Recommendation	Not Started	P&C Agent							06/30/18												
Umbrella Insurance																					
Recommendation	Not Started	P&C Agent							06/30/18												
<b>Long Term Care Insurance</b>																					
Recommendation	Not Started	Financial Advisor											12/31/19								
<b>Life Insurance</b>																					
Recommendation 1	Not Started	Financial Advisor							09/30/18												
Recommendation 2	Not Started	Financial Advisor							09/30/18												
<b>Cash Flow</b>																					
Recommendation 1	In Progress	Client							06/30/18												
Recommendation 2	Not Started	CPA							09/30/18												
Recommendation 3	Not Started	Client											12/31/18								
Recommendation 3.1	Not Started	Financial Advisor											12/31/18								
<b>Retirement</b>																					
Recommendation 1	Not Started	Client																			12/31/20
Recommendation 2	Not Started	Financial Advisor											03/31/19								
Recommendation 2.1	Not Started	Financial Advisor											03/31/19								
Recommendation 3	Not Started	CPA											06/30/19								
<b>Investment</b>																					
Recommendation 1	Not Started	Client							09/30/18												
Recommendation 2	Not Started	Financial Advisor							09/30/18												
Recommendation 3	Not Started	Financial Advisor											12/31/18								
<b>Business</b>																					
Recommendation 1	Not Started	Financial Advisor							09/30/18												
Recommendation 1.1	Not Started	Client							09/30/18												
Recommendation 2	Not Started	Corporate Attorney											12/31/18								
Recommendation 2.1	Not Started	Financial Advisor											12/31/18								
Recommendation 3	Not Started	Corporate Attorney											03/31/19								
Recommendation 4	Not Started	Financial Advisor											06/30/19								
<b>Estate &amp; Legal</b>																					
Recommendation 1	Not Started	Estate Planning Attorney							09/30/18												
Recommendation 1.1	Not Started	Client							09/30/18												
Recommendation 2	Not Started	Estate Planning Attorney											12/31/18								
Recommendation 2.1	Not Started	Client											12/31/18								
Recommendation 3	Not Started	Estate Planning Attorney											03/31/19								
Recommendation 3.1	Not Started	Client											03/31/19								
Recommendation 3.2	Not Started	Estate Planning Attorney											06/30/19								