	Business Planning	Periodic Business Review						
	Prepare	Conduct				Follow Up		
				Oversee Tasks to Monitor Business Plan				
Advisor		Conduct Business Review →		START \rightarrow Any to Bu	corporate y Changes usiness Plan	Assign Follow Up → Tasks to Team Members →	Launch Periodic Business Review \rightarrow END Workflow Again	
Associate Advisor								
Associate								
Client Service Associate	START → Confirm Business → Schedule Business → Create Business → Reports & eports Needed → Review → Reports & → Reports with Advisor → Recurring Reminder							

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