

Date:

# The Passport Package™ Expansion Passport™ ANNUAL RECAP

*When clients or prospects complete your scorecard as a part of their annual review, reviewing their answers, side by side, can enrich your conversations. We created this simple, fillable PDF so you can compare their responses over time: Just input their scores from the Q&A Summary document for both the prior and current years.*

	PRIOR YEAR:		CURRENT YEAR:	
	NOW	GOAL	NOW	GOAL
READINESS MINDSET				
FOUNDATION MINDSET				
RESOURCE MINDSET				
WELLNESS MINDSET				
CARING MINDSET				
ACCUMULATION MINDSET				
WALKAWAY™ MINDSET				
PARTNERSHIP MINDSET				