



Session 7 Completion and Continuing Challenge

Session 7 - Legacy, Integration and the Freedom Plan | Participant Resource | Version 1.0

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Continue the process

- ☐ Complete the first 30-day action.
- ☐ Hold the planned household or legacy conversation.
- ☐ Review progress by Day 90.
- ☐ Update the Personal Freedom Plan after a major life or financial change.
- ☐ Complete an annual financial-house review.

My commitment

First action: _____

Completion date: _____

Person who will support or encourage me: _____

How I will celebrate responsible progress: _____

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