

# ACCOUNT REVIEW

**Account:** \_\_\_\_\_

On a scale from one to ten, how close are you right now to where you envision being in this account?  
(1 - it seems very distant, 10 - you are living it)

On a scale from one to ten, are you living out your purpose in this account? (1 - not at all, 10 - everyday)

Are there any people you need to thank that relate to this account?

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What are some of your most moving memories from the past year that relate to this account?

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What are the gaps in this account that need to be closed to improve in the year to come?

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What needs to change in your heart or attitude regarding this area of your life in the next year?

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What specific actions will you commit to taking in order to build equity in this account?  
Be sure to include a specific and measurable time frame for each action.

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