



Call Prep Sheet

| Participant Name: |
|---|
| Advisor Name: |
| Date: |
| Progress since last meeting: |
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| Outstanding Items/Intended to Accomplish: |
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| Current Challenges: |
| Current Chanenges. |
| |
| Current Opportunities: |
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| Direction for Next Session: |
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| Action Items (to be completed before next session): |
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