

# ESTATE ACCOUNT REVIEW PROGRAM™

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ESTATE: \_\_\_\_\_

Value: \_\_\_\_\_ Interest: \_\_\_\_\_

Rating System:      Pass/Green      Caution/Amber      Fail/Red

**Comments:** \_\_\_\_\_

Professional Fees:

Compensation:

Release:

Other:

**Recommendations:** \_\_\_\_\_

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Prepared for:

Date:

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