

Coordination agenda

Bring connected questions into one conversation without oversharing.

Build on earlier weeks: Draw on the questions accumulated in weeks 1-7. Use secure agreed channels if you choose personal advice.

The goal and decision

What am I trying to accomplish, and what decision am I considering?

Connected questions

What financial, tax, legal or charitable questions could affect that decision?

Roles and permission

Who is qualified to answer each question? What information, if any, would I separately authorize sharing?

Unanswered before action

What needs confirmation before I act? What summary or next step will I request?

Keep private: Use categories or initials. No account numbers, passwords, health details or other people's private information. This paper is yours; do not upload it to the site.

This is an agenda, not a tax strategy, legal instruction or blanket permission to share.

Reading pool: Retirement X-Ray printed 170–177; Steward's Code Ch.14 pp.83–87 — printed pages in retrieved pre-editor manuscript; instructor review required. Source map and review gates accompany the curriculum.