

NO REGRETS MOVE™

Next-Steps Worksheet

What requires verification, who is responsible and when the information is needed

Record each item that still needs to be verified before the client makes a difficult-to-reverse commitment. Keep entries factual and specific.

Client or household reference	Prepared by	Date

Item requiring verification	Who is responsible	Needed by	Status

Referrals made or suggested

Professional type	Reason	Date

Agreed next step and review date

Referrals are offered for the client's convenience. The client remains free to select any professional.

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