

# Account Tasks Report

Generated: November 27, 2025 at 2:45 p.m.

## Summary

Total Tasks: 2

Pending: 1

Completed: 1

Urgent Priority: 0

High Priority: 1

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## Burkholder

### %É make trade

B • RRSP • Priority: HIGH • Due: 2025-11-27

## Bergren, Sr

### ' set up portfolio details

Joint Account • Joint Cash - Bergren Sr. Cash • Priority: MEDIUM • Due: 2025-11-26 • Completed: 2025-11-27