Simplified Strategy Report Template (TinyLLaMA-Compatible)

# Prospect Curator

Task: List the types of clients this strategy is good for.  
  
Instructions:  
- Make a bulleted list.  
- Use clues from the input text to decide who would benefit most.

# Back of the Napkin

Task: Show a placeholder image.  
  
Instructions:  
- Output this line exactly:  
 "Placeholder for AI Generated 'Back of the Napkin' Image"

# The Pitch

Task: Write 3 parts:  
1. A short summary of the strategy in plain words. Who is involved? What happens? How does money move?  
2. Key details: What makes this plan special? What relationships or steps matter?  
3. One sentence with a bold value promise. Don’t use commas or conjunctions.

# Rewards

Task: What are the benefits?  
  
Instructions:  
- Make a bulleted list.  
- Use only items clearly supported by the source text.  
- Don’t copy from other examples.

# Client Needs

Task: Explain what the client is facing.  
  
Instructions:  
- Use 3 to 4 clear and urgent sentences.  
- Describe risks, tensions, or practical problems from the input.

# The Elixir

Task: Show how the strategy helps.  
  
Instructions:  
- Write 3 to 4 sentences.  
- Make a strong bridge from the client’s needs to the impact of the solution.  
- Don’t repeat earlier wording.

# Insurance+

Task: Explain what type of insurance supports the plan.  
  
Instructions:  
- Say what type is used and why it fits.  
- Focus on how insurance improves the plan.

# Landmines

Task: Show possible mistakes or risks.  
  
Instructions:  
- Make a bullet list.  
- Include at least 3, max 7.  
- Each one should be specific, based on what’s in the text.

# Path to Close

# Head Start on Diligence

Task: List early steps to get this strategy moving.  
  
Instructions:  
- Bulleted list of action items.  
- Include forms, analysis, letters, or client education based on the text.

# What Will Clients Ask?

Task: Write Q&A based on the text.  
  
Instructions:  
- 2 Questions + Answers:  
 1. One short Q&A for a simple concern.  
 2. One longer Q&A for a big picture or strategy issue.

# Sustain Success

# Stay in Contact

Task: List follow-up actions.  
  
Instructions:  
- 3–7 bullet points.  
- Include reviews, audits, reminders, or updates from the text.

# Look Ahead

Task: What’s next?  
  
Instructions:  
- Make a list of future ideas, changes, or related strategies.  
- Include new questions or upcoming rules if mentioned.