

THE SUSTAIN PHASE™ TRANSITION PLANNER

Client Name: _____ Current Date: ____ Protocol Start Date: _____ Phase:

Transitioning from *Target* to *Sustain*

Section 1: The "Wins" Audit (Objective & Subjective)

Before moving into long-term maintenance, we must acknowledge the foundation we have built. Reflect on your journey over the last 90–120 days.

Top 3 Clinical/Lifestyle Wins: 1. _____ 2. _____ 3. _____

Objective Progress Check: - ☐ Initial Symptoms Improved (List: _____) - ☐ Lab Re-testing Completed (Date: __) - ☐ **Supplement Consistency (Rate 1-10):** __ - ☐ Lifestyle Integration (Diet/Sleep/Stress): ☐ Stable ☐ Needs Support

Section 2: The "90-Day Obstacle" Audit

It is common for initial excitement to fade as protocols become "normal life." Let's identify potential friction points to prevent a relapse.

Potential Barrier	Impact Level (1-5)	Strategy to Overcome
Routine Fatigue (Boredom)		
Social/Travel Pressures		
Financial Sustainability		
New/Lingering Symptoms		

The "Future Self" Visualization: Where do you want your health to be 12 months from today?

Section 3: The Sustain Roadmap

Health is a lifelong journey, not a destination. Choose your path for the next 12 months to ensure your results become your "new DNA."

Recommended Continuity Path: - ☐ **The Alumni Membership (e.g., Vitality Circle):**

Monthly group support, Q&A, and community. - ☐ **The Optimization Track:** Quarterly 1-on-1 deep dives for advanced biohacking/longevity. - ☐ **The Maintenance Track:** Semi-annual check-ins and foundational supplement support.

Strategic Re-Testing Schedule: * ☐ Annual Functional Blood Chemistry (Date: __) * ☐ **Advanced Genomic/Microbiome Testing (Target Date: __)** * ☐ Seasonal Detox/Reset

Program (Month: _____)

Section 4: Practitioner Reflection & Next Steps

Practitioner Observations:

Agreed Next Step: - ☐ Enrollment in Alumni Program - ☐ Schedule 6-Month Lab Review - ☐ Transition to Maintenance Supplement Protocol

Next Connection Date: _____

AccrediPro Standards Institute Certified Tool R.O.O.T.S. Method™ Compliant: Sustain Phase
