

# THE SUSTAIN PHASE™ TRANSITION PLANNER

Client Name: \_\_\_\_\_ Current Date: \_\_\_\_\_ Protocol Start Date: \_\_\_\_\_ Phase:  
Transitioning from *Target* to *Sustain*

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## 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

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## 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?

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## 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: \_\_\_\_\_)

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## Section 4: Practitioner Reflection & Next Steps

### Practitioner Observations:

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

**Next Connection Date:** \_\_\_\_\_

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

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