## Stress Test Template

**Stress Test for <Client Name(s)>  
Memorandum of Findings  
<Date>**

Our goal with your stress test was to challenge elements of your wealth planning to assess the likelihood of their efficacy in different scenarios and at delivering the results you expect.

### Objectives

The following are the key results you would like to achieve.

* Objective
* Objective
* Objective

### Assessment

This is the current status of the actions currently being taken, including any deficiencies that may not support achieving your results.

* Assessment item
* Assessment item
* Assessment item

### Options

These are other approaches that could be taken to achieve your desired results, with comparisons to current actions being taken.

* Option
* Option
* Option

### Recommendations

This is our recommended course of action:

* Action item
* Action item
* Action item