NEW CLIENT PROCESS

3rd Appointment Agenda

YOUR PERSONAL FINANCIAL ORGANIZER

[Client Name]

[Date]

[Time]

ITEMS TO BE DISCUSSED:

- Meeting Overview
- Review of Our Practice & Approach
- The Planning Process – Critical Financial Events
- Our Value-Added Services
- Your Personal Financial Organizer
- Review Your Goals & Objectives
- Current Strategy Review
- Additional Strategies for Discussion
- Steps to Implementation
- Where We Go From Here