

## **NEW CLIENT PROCESS**

## 1<sup>st</sup> Appointment Agenda

## Is there a fit?

[Prospective Client Name]

[Date]

[Time]

## Items to be discussed:

- Meeting Overview
- About Our Practice and Approach
- The Planning Process Critical Financial Events
- Understanding Your Expectations
- Your Financial & Darby; Lifestyle Goals What's Important to You?
- Where We Go from Here