

AGENDA

Introduction to Our Team

[Strategic Partner Name]

[Date]

[Time]

- **Meeting Overview**
- **Our Practice and Approach**
 - An Introduction to Our Team
 - Our Wealth Management Process
 - Critical Financial Events
 - Our Fee for Service
- **Our Client Experience**
 - How We Bring on New Clients
 - Our Personal Financial Organizer
 - Our Proactive Service Model
 - Our Introduction Process
- **Do You Have Any Questions?**
- **Meeting Wrap-Up**