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**