Agenda for “B” Clients

Review Meeting

**[Client Name]**

**[Date]**

**[Time]**

* **Meeting Overview**
* **Review of Our Practice and Approach**
  + Our Wealth Management Process & Your Critical Financial Events
* **Review of Your Situation & Solutions**
  + Review Your Goals and Objectives
  + Strategies to Achieve Your Goals
  + Additional Items for Discussion
* **Steps to Implementation**
* **Meeting Wrap-Up**