Step 7

1st Appointment Agenda

Is there a Fit?

**[Prospective Client Name]**

**[Date]**

**[Time]**

* **Meeting Overview**
* **About Our Practice and Approach**
	+ An Introduction to Our Team
	+ Our Wealth Management Process
	+ Your Critical Financial Events
	+ Our Fee for Service
* **Understanding Your Expectations**
* **Your Wealth & Lifestyle Goals**
	+ What’s Important to You?
	+ Where You Are Right Now
* **Meeting Wrap-Up**