**The Initial Agenda**

**An Introduction to Each Other**

[Candidate Name]

[Date]

**Items to Be Discussed:**

* **Meeting Overview**
* **About Our Advisory Practice & Our Vision**
  + - Our Business History & Approach
    - Our Team & Our Clients
    - What We Are Looking For
* **About You & Your Expectations**
  + - Your Experience & Qualifications
    - What You Are Looking For
    - Why Is this the Position for You?
    - Is There Anything Else I Should know?
* **Do You Have Any Questions?**
* **Next Steps**