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**