Your Wealth Management Planning Session

**Client Name**

**Month Day, Year**

**Time**

* **Meeting Overview**
* **Review of Our Practice & Purpose** 
  + Our Wealth Management Approach
  + Our Introduction Process
* **Review of Your Personal Financial Organizer**
  + What & Who is Important to You?
    - Your Goals & Significant Life Events
    - Your Family & Other Important People or Purposes
  + A Review of Your Current Wealth Management Strategies
    - Cashflow Planning
    - Tax Planning
    - Retirement Planning
    - Investment Management
    - Family Security
    - Caring For Others
    - Your Legacy
    - Business Planning & Succession
  + Is there Anything Else You Would Like to Discuss?
* **Meeting Wrap Up**
  + Administrative Follow Up
  + Do You Have Any Questions?
  + Next Steps