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