1st Appointment Agenda

Update Meeting

**[Client Name]**

**[Date]**

**[Time]**

* **Meeting Overview**
* **Update on Our Practice and Approach**
  + Our Team
  + Our Wealth Management Process
  + Your Critical Financial Events
  + Our Fee for Service
  + Our Introduction Process
* **Update on Your Situation**
  + What is Important to You?
  + Your Personal Financial Profile Update
* **Meeting Wrap-Up**