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**