Step 11

2nd Appointment Agenda

Your Personal Financial Profile

[Client Name]

[Date]

[Time]

* **Meeting Overview**
* **Review of Our Practice and Approach**
  + Our Wealth Management Process & Your Critical Financial Events
  + Our Introduction Process
* **Review of Your Goals and Objectives**
  + What’s Important to You
* **Your Current Circumstances**
  + Your Personal Financial Profile
  + Review of the Items We Requested You Bring
* **Meeting Wrap-Up**