Step 7

1st Appointment Agenda

Is there a Fit?

[Prospective Client Name]

[Date]

[Time]

* **Meeting Overview**
* **About Our Practice and Approach**
  + An Introduction to Our Team
  + Our Wealth Management Process
  + Your Critical Financial Events
  + Our Fee for Service
* **Understanding Your Expectations**
* **Your Wealth & Lifestyle Goals** 
  + What’s Important to You?
  + Where You Are Right Now
* **Meeting Wrap-Up**