Step 13

3rd Appointment Agenda

Your Personal Financial Organizer

[Client Name]

[Date]

[Time]

* **Meeting Overview**
* **Review of Our Practice and Approach**
	+ Our Wealth Management Process & Your Critical Financial Events
	+ Our Introduction Process
* **Your Personal Financial Organizer**
	+ Review Your Goals and Objectives
	+ Strategies to Achieve Your Goals
	+ Additional Items for Discussion
* **Steps to Implementation**
* **Meeting Wrap-Up**