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**