**Initial Meeting Agenda**

[Potential Client Name]

[Date]

[Time]

**Items to Be Discussed:**

1. **Meeting Overview**
2. **An Introduction to Our Team & Our Approach**

* Our Team of Professionals & Organization
* Financial Planning & Your Critical Financial Events
* Your Personal Financial Profile
* Your Personal Financial Organizer
* Understanding Our Fees

1. **Getting to Know More About You**
   * Understanding Your Expectations of a Financial Planner
   * What is Important to You?
2. **Meeting Wrap Up**