**WEALTH MANAGEMENT & PORTFOLIO REVIEW**

**Client Name**

**Month Day, Year**

**Time**

* **MEETING OVERVIEW**
* **REVIEW OF OUR PRACTICE & PURPOSE** 
  + Our Wealth Management Approach
  + Our Introduction Process
* **REVIEW OF YOUR PERSONAL FINANCIAL ORGANIZER**

**The WHY:**

* + What’s Important to You – Your Goals & Significant Life Events
  + Who’s Important to You – Your Family & Other

**The HOW:**

* + Daily Living & Cashflow Planning
  + Current Savings - Your Investment Strategies
  + To & Through Retirement – Your Financial Plan
  + Caring for Others
  + Tax Planning Strategies
  + Your Family Security
  + Leaving Your Legacy
  + Business Planning & Succession
  + Is there Anything Else You Would Like to Discuss related to Planning?
* **ACCOUNT ADMINISTRATION**
  + KYC Profile Review/Update
  + Beneficiary Review
  + Other
* **MEETING WRAP UP**
  + Do You Have Any Questions?
  + Next Steps