**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