**Insurance Options Meeting Agenda**

[Potential Client Name]

[Date]

[Time]

**Items to Be Discussed:**

1. **Meeting Overview**
2. **A Review of Your Current Situation & Family Security Needs**
   * Review the Purpose of Insurance for you and your family
   * Discuss Your Significant Life Events – Planned & Unplanned
3. **An Overview of Insurance Solutions** 
   * Review & Discuss Your Insurance Options
   * Answer Your Questions
   * Determine the Most Suitable Option
4. **Next Steps**
   * Advisor Disclosure
   * What You Can Expect Next
5. **A Brief Reminder of Our Approach**

* Our Belief about Personal and Family Security
* Helping You Help Others

1. **Meeting Wrap Up**