**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**