**Implementation Meeting Agenda**

[Potential New Client]

[Date]

[Time]

**Items to Be Discussed:**

1. **Meeting Overview**
2. **Helping You Get Things Underway**
* Review Your Current Goal(s) – What Matters Most to You
* Review Your Personal Financial Organizer
* Discuss Any New Items of Importance to You
1. **Steps to Implementation**
2. **A Quick Reminder**
	* Your Significant Life Events
	* How to Help Those You Care About
3. **Meeting Wrap-Up**
	* Do You Have Any Questions?
	* Next Step