**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