**Fact-Finding Meeting Agenda**

[Potential Client Name]

[Date]

[Time]

**Items to Be Discussed:**

1. **Meeting Overview**
2. **A Brief Review Our Approach to Financial Planning**

* Financial Planning & Your Significant Life Events
* Our Introduction Process

1. **Review Your Current Goals** 
   * What’s Important to You?
2. **Where You Are Today** 
   * Getting to Know Your Situation – Your Personal Financial Profile
   * Review of the Items You Brought Today
3. **Meeting Wrap Up**