**Review Meeting Agenda**

[Client]

[Date]

[Time]

**Items to Be Discussed:**

1. **Welcome & Meeting Overview**
2. **Helping You Achieve What Matters Most to You**
* Your Personal Financial Organizer (PFO)
	+ Review Your Goals
	+ What We Are Doing to Achieve Your Goals
	+ Anything New You Would Like to Discuss
1. **Account Administration & Personal Updates**
2. **A Quick Reminder**
	* Our Wealth Management Continuum
	* Here to Help You and Those You Care About
3. **Meeting Wrap-Up**
	* Do You Have Any Questions?
	* Our Next Steps…