**Initial Meeting Agenda**

[Potential Client Name]

[Date]

[Time]

**Items to Be Discussed:**

1. **Meeting Overview**
2. **An Introduction to Our Team & Our Approach to Helping You**

* About Myself & Our Team of Professionals
* What is Life Insurance & How Does it Tie to Your Significant Life Events
* Our Approach to Insurance Solutions
* Your Personal Insurance Organizer

1. **Getting to Know More About You & Your Family**
   * Understanding Your Current Situation:
     + Tell us more about your FAMILY
     + What do you do by way of VOLUNTEERING/HOBBIES/TRAVEL?
     + Describe your WORK and/or INCOME
     + What do you OWN & OWE
     + Can you provide a high level HEALTH overview
   * Discussion of Your Immediate Needs & Concerns
   * Is there anything else is important to you that you’d like to discuss today?
2. **Next Steps**
   * Complete our Insurance Needs Analysis
3. **Meeting Wrap Up**