**Policy Delivery Meeting Agenda**

[Client Name]

[Date]

[Time]

**Items to Be Discussed:**

1. **Meeting Overview**
2. **A Review of Your Risk Management Needs & Goals**
	* What’s Important to You
	* Planning for Your Significant Life Events
3. **Our Strategy to Help You Achieve Your Goal**
	* Your Personal Insurance Organizer & How to Use It
	* Your New Insurance Policy
	* Understanding How Your Policy Works
	* Do You Have Any Questions?
4. **Next Steps**
	* Our Action Items from this Point Forward
	* Your Action Items from this Point Forward
5. **A Brief Reminder of Our Approach**
* Our Belief about Personal and Family Security
* Significant Life Events – Planned & Unplanned
* Helping You Help Others
1. **Meeting Wrap Up**