**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**