**Implementation Meeting Agenda**

[Client Name]

[Date]

[Time]

**Items to Be Discussed:**

1. **Meeting Overview**
2. **A Brief Review of Our Approach to Financial Planning**
   * Significant Life Events
   * The Introduction Process
3. **Your Personal Financial Organizer**

* Review Your Goals & Objectives
* Strategy Review
* New Items for Discussion

1. **Steps to Implementation**
2. **Meeting Wrap-Up**