Agenda- First Planning Meeting

Date: ___________________________________

Client name: ____

The purpose of this meeting is to allow me to learn about your current situation and goals for the future in order to develop a proposed financial plan, and for you to learn a few financial planning concepts and how our team services the needs of clients. Normally the first meeting proceeds along the agenda which follows, but every meeting is a little different and discussion is most welcome.

1. Your basic situation:
    - family
    - employment
    - What you want to accomplish through financial planning

2. The role of:
    - a financial planner
    - the McGruer Financial Team
    - Dundee Private Investors Inc.

3. Details of your present situation:
    - wills and powers of attorney
    - life and disability insurance
    - employment details, benefits
    - pension status
    - income and major financial related spending
    - assets and liabilities
    - income tax situation, RSP limits

4. Specific goals of planning

5. Question and answer

6. Scheduling of second meeting to review proposed financial plan