

Agenda-Second Planning Meeting

Date: _____

Client name: _____

The last time we met was primarily to exchange data. The purpose of this meeting is to **review the proposed financial plan** which I have prepared. The plan is a combination of general information and its specific application to your situation. At this meeting we will slowly flip through the pages and I will narrate the important components, looking at some sections in detail while leaving others for your to read later. There is a main text body, several tables and a few additional reference pages at the back.

1. Summary of advantages of the plan.
2. The text body of the plan including an explanation of all recommendations.
3. Summary of recommendations
4. Tables of data and calculations.
5. Implementation
6. How Dave earns a living
7. Client/Advisor partnership
8. Scheduling of a third meeting (see proposed agenda) to review the plan and any modifications made as a result of this second meeting.

Other items/notes

A. Date for third meeting: _____

B. _____

C. _____

D. _____