

Agenda- Third Planning Meeting

Date: _____

Client name: _____

The last time we met we reviewed your draft financial plan. The purpose of this meeting is to discuss any questions you have about the proposed plan, any modifications which have been made since the last meeting and (if appropriate) review the actions necessary to implement the plan.

1. Clarification of concepts and recommendations in the plan.
2. Modifications made to the plan since the last meeting.
3. Modifications yet to be made to the plan.
4. Action steps and schedule.
5. Complete paperwork if appropriate.
6. Schedule next meeting.

Other items

A. Date for next meeting: _____

B. _____

C. _____

D. _____