

Agenda

Subject: 1st Appointment: Is There a Fit?

Date: Month Day, Year at 2:00 p.m.

Attendees: [prospective client name and any person attending the meeting]

Items to Be Discussed:

- Meeting Overview
- About My Practice
 - Our Background
 - Compensation
 - My Approach and Preparing for Critical Financial Events
- About You
 - What is important to you?
 - Your Background
 - Your Current Situation
- Where do we go from here?

Follow-up Call Date and Time: _____

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