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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