Client Meeting Agenda

Date of Meeting: _____ Time of Meeting: _____

In order to assure we address your concerns and needs as fully and efficiently as possible please complete the following agenda of topics to be covered:

Questions regarding your financial situation?

1)

2)

3)

4)

5)

I would like to review the following changes in my financial condition:

1)

2)

3)

I would like to discuss the following investment strategies:

1)

2)

3)

I would like additional information on the following investment programs:

1)

2)

3)

Thank you for the opportunity to serve you. We will be with you promptly.

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