# Free Consultation Meeting

Date: ______________________ Name ______________________

## Agenda

1. Discuss the purpose of the meeting and what you can expect to gain.
2. Collect high-level personal and financial information and discuss any specific goals you may have.
3. Prepare and review an analysis of your current financial situation, the Big Picture.
4. Complete the Review Checklist for the following:
    - Cash Flow analysis
    - Financial Asset analysis
    - Income Tax analysis
    - Risk Management analysis
    - Retirement Options
5. Clarify your understanding of the analysis and make any necessary changes as directed by you.
6. Provide a printed/email copy of the Big Picture to you for future reference.
7. Discuss next steps pertaining to the following:
    - Financial Management
    - Asset Management
    - Risk Management
    - Tax Planning
    - Retirement Planning
    - Estate Planning

## Meeting Notes

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## Meeting Notes *(con't)*