

Advice and Recommendations Meeting

Date: _____ Name _____

Agenda

1. Review previous meeting discussions and relevant notes.
2. Discuss the type of analysis completed, any assumptions made and the reason for doing so.
3. Review the updated financial analysis and any changes that have been made based on new information.
4. Present recommendations, the benefits and any supporting analysis.
5. Discuss next steps.
6. Book future meetings
 - Follow-up meeting: _____
 - Purpose of meeting: _____
 - Review meeting: _____

Meeting Notes