Investment Review Meeting

Date: ____________________

Name: ____________________ ____________________

DOB: ____________________ ____________________

Email: ____________________ ____________________

Phone: ____________________ ____________________

Address: ____

Agenda

1. Review existing investment statements to ensure records are up to date:
   - Allocation
   - Performance
   - Contributions
   - Contact/address

2. Discuss investment profile in relation to the type of investments owned:
   - Do you understand the investments you own?
   - Do they still align with your risk profile and goals?

3. Discuss life changes that may have occurred since our last meeting:
   - Marital status
   - Family addition
   - Health change
   - Smoking status
   - Employment status
   - New home
   - Mortgage renewal
   - Group changes

4. Agree on any actions that are required including responsibility and timeframe for completion.

5. Schedule the “Know My Client Review” Meeting: