Engagement Agenda

FINANCIAL PLANNING SERVICES

Client: Date:

Learn more about you

- What brings you here today? What's your most important financial goal or concern for us to discuss?
- What's on your bucket list?
- What accomplishments/progress are you most proud of to date?

Your vision and goals

- Your goal timeline
- Your goal summary to document what's most important to you

Your preliminary financial information

- Review and organize information already provided (if applicable) — and discuss:

Covering needs

- How do you manage paying your expenses?
- How much have you set aside for emergencies?
- How would you feel knowing these expenses could be covered?
- What is leftover each month that could be used toward saving for your goals?

Creating income for wants

- How did you determine the costs for your lifestyle expenses?
- How do your savings strategies and current investment mix align toward helping you reach your goals?
- If you continue your current savings strategies, how confident are you that you will reach your goals?

Preparing for the unforeseen

- When did you last review your insurance policies to assess the adequacy of your coverage?
- How have you prepared for the impact of an unforeseen event (e.g., death, disability, extended health care stay)?
- How do you know if you are adequately protected for one or more of these scenarios?

Leaving a legacy

- When did you last update your:
  - Will?
  - Trust?
  - Power of attorney?
  - Health care directive?
- How prepared do you feel about leaving a legacy?
- How confident are you that someone will be able to step in and distribute your estate as you wish?

What's next

- Decide the best way to work together, including fees
- Next meeting(s) and topics to cover

Recommendations:

Client To-Dos:

Advisor/Staff To-Dos:

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