HOW IT'S DONE

Sample Agenda for Discussion

April 9, 2010
2:00pm
Charlie Client

1. Client Concerns, Topics, or Discussion Items
2. Review 2009
   a. Insurance and Protection
   b. Savings and Growth Investments
   c. Discuss Cash Flow Spending Plan
   d. Review Peace of Mind BluePrint and Transitions
   e. Discuss FireProof File Box and Financial Plan
   f. Update Client File Information/Beneficiaries
   g. Review Client Advisor Agreement and Communication Protocols
3. Discuss Goals and Transitions for 2010
4. Develop Action Plan for 2010
5. Referrals to a Friend, family, or Business Associate
6. Set Next Meeting Topic and Date
7. Thank you!

Please don't keep us a secret.
We are never too busy to help your family and friends.

Ed Howat, Jr., CLU, ChFC, LUTCF, RCC ● Addie Woods Consulting Co ● ed@addiewoods.com ● 651.405.6644