JAMES INVESTMENT GROUP INC.

Sample Annual Review Meeting Agenda

Goals for meeting today

- **Financial & Personal Update –** what's new with you?
- **Retirement Update**
- **Investment Portfolio Review**
- **Beneficiary & Trusted Contact Review**
- **Address any questions, comments or concerns**

Topics for review

- **Financial & Retirement Update**
  - Introduction to our Retirement Transition Process
  - Utilize Goal Planning & Monitoring Software
- **Investment Portfolio Review**
  - Review Current Asset Allocation & Risk Tolerance
    - Does this Asset Allocation align with your Risk Tolerance?
  - Account Updates & Recommendations
- **Beneficiary & Trusted Contact Review**

Share James Investment Group resolutions

- **Update Your Estate Plan**
  - When was the last time you updated your will?
  - Do you have Financial & Medical POAs setup and an executor assigned?
- **Planning for the unexpected**
  - Have you discussed your wishes with you executor, POA, or beneficiaries?
    - Can we help facilitate this conversation?
- **Insurance Review** (Group, Term, Disability, or Long-Term Care)
  - Do you have enough coverage given your current situation?

673 WESTBURY DRIVE, SUITE 101
IOWA CITY, IOWA 52245-2731

T: 319-354-7113
F: 319-354-0534

JAMESINVESTMENTGROUPINC.COM