

# Sample Initial Meeting Agenda

## **Goals for meeting today**

Our goal for an Initial Meeting is to get to know you and understand your current financial situation.

What is your Goal for meeting today?

## **Topics for review**

#### More about you

- What brings you in today?
- What personal or financial goals are you working towards right now?
- Have you ever worked with a Financial Advisor before?
- What services or support do you value most from a Financial Advisor?

#### Optional: Review any information you've prepared for our meeting

\*See list of Recommended Documents

**James Investment Group Overview** 

Company History & Explanation of Services

**Questions, Comments or Concerns?** 

### **Next Steps**

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#### JAMESINVESTMENTGROUPINC.COM

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