**Review Meeting Agenda**

[Client]

[Date]

[Time]

**Items to Be Discussed:**

1. **Meeting Overview**
2. **A Brief Review of Our Approach to Financial Planning** 
   1. Managing Your Significant Life Events
3. **Your Personal Financial Organizer**
   1. Review Your Goals – What’s Important to You?
   2. Your Strategy Review & Updates
   3. New Items for Discussion
4. **Account Administration**
   1. KYC Profile Review/Update
   2. Other
5. **Do You Have Any Questions?**
6. **Meeting Wrap-Up**