**FIT Meeting Agenda**

[Potential New Client]

[Date]

[Time]

**Items to Be Discussed:**

1. **Meeting Overview**
2. **Our Wealth Management Professionals & Approach**

* A Bit About Myself
* Our Wealth Continuum & Approach
* How We Help Our Clients Manage Their Financial Lives
* Understanding Fees

1. **Getting to Know More About You**
   * Understanding Your Expectations & Current Situation
   * How Can We Help You today?
   * Is There Anything Else That is Important to You?
2. **Meeting Wrap Up**

* Do You Have Any Questions?
* Next Steps