



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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