

New Client Meeting Agenda

Held with: _____

Meeting Date: _____

1. *What brings you here today? What was the motivation for you to contact us?*

2. *How do you think Arnold Stevens Finlay can help you?*

3. *Getting to know you:*

To understand your goals and ambitions we'd like to discuss:

- a. Where you would like to be?
- b. Where you are now?
- c. Have you any experience with Financial Planning up until now? How did you find that?
- d. What are your expectations of the financial planning process?

4. *Identify activities to assist in the achievement of your goals*

5. *Explanation of our fees*

6. *Next Steps*

7. *Complete Financial Needs Analyser*

8. *Assign actions*