

Virtual meeting advisor template

Client name: _____

Advisor name: _____

Team members' names: _____

Advisor firm name: _____

Date: _____

Meeting agenda

- 1 What's top of mind for you and your family?
- 2 Financial goals update
- 3 Online resources available to you
- 4 Next steps/next meeting

1 What's top of mind for you and your family?

List their answers to these questions—fill this out **during** the meeting.

A _____
B _____
C _____

2 Financial goals update

List their primary financial goals here—fill out **before** the meeting.

A _____
B _____
C _____

3 Online resources available to you

List the online resources and tools that are available to them—fill out **before** the meeting.

A _____
B _____
C _____

4 Next steps

List the agreed-upon action items—fill this out at the **end** of the meeting.

A _____
B _____
C _____

Establish the next meeting date—fill this out at the **end** of the meeting.

Next meeting:

Date: _____
Time: _____

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