today’s MEETING

**Framework for our meeting on:** [insert date at 00:00] until [01:00]

**Between:** [insert client name] & [insert adviser name]

###### Checking understanding:

* + Your objectives / experience / expectations
  + What do you know about our firm and myself?

###### How we deliver solutions in your area of interest:

* + Using your existing provisions first
  + Our high level process
  + What value will we add?

###### Summary

* + What we can expect from each other ongoing
  + Next steps?

**THE PROCESS WE FOLLOW**

[INSERT YOUR HIGH

LEVEL PROCESS

DIAGRAM HERE]