today’s MEETING

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

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

###### Objectives check

###### You – how are you and your priorities?

###### Plans – reminder of their original purpose

###### Progress check

###### Your financial plan overall

###### Your plans with us – update

###### Advice refining

###### Do we need to refine?

###### Any impacts due to Regulation / Legislation / Economy?

###### Keeping you and your plans on track

**THE PROCESS WE FOLLOW**

[INSERT YOUR HIGH

LEVEL PROCESS

DIAGRAM HERE]