New Client Meeting Agenda

ARNOLD STEVENS FINLAY
Real Solutions

- Wealth Creation
- Retirement Planning
- Investment Advice
- Superannuation
- Personal Insurance
- Estate Planning
- Loans
- Leasing

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***