Agenda - First Planning Meeting

Date: ______________________________________

Client name: ____

The purpose of this meeting is to: allow you to learn or review a few financial planning concepts and how my team services the needs of clients; and to allow me to learn about your current situation and goals for the future in order to develop a proposed financial plan. Normally the first meeting proceeds along the agenda which follows and takes about 90 minutes, but every meeting is a little different and discussion is most welcome.

1. Your present situation (approx. 60 min) :
   - family
   - employment and benefits
   - wills and powers of attorney
   - life and disability insurance
   - income and major financial related spending
   - assets and liabilities
   - income tax situation, RSP limits

2. The role of (approx 20 min):
   - a financial planner
   - basic financial concepts
   - the McGruer Financial Team

<u>Bring to meeting</u>
- pay stub
- mortgage statement
- investment statements
- insurance policies and statements
- will and power of attorney
- debt info
- pension info
- employment benefits

3. Specific goals of planning. If we agree to work together and you are looking back three years from now, what will have needed to happen to make you very happy about the financial planning process and my team's work?

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4. Question and answer

5. Letter of engagement review and signing

6. Scheduling of second meeting to review proposed financial plan ______________