



**DUNDEE**<sup>®</sup>  
**PRIVATE INVESTORS INC.**  
A DUNDEE WEALTH MANAGEMENT COMPANY

## Agenda - Third Planning Meeting

Date: \_\_\_\_\_

Client name: \_\_\_\_\_

The last time we met was to take a first look at your draft financial plan. The purpose of this meeting is to discuss any **questions** you have about the proposed plan, any **modifications** which have been made since the last meeting and (if appropriate) review the **actions** necessary to implement the plan.

1. Clarification of concepts and recommendations in the plan.
2. Modifications made to the plan since the last meeting.
3. Modifications yet to be made to the plan.
4. Action steps and schedule.
5. Complete paperwork if appropriate.
6. Schedule next meeting.

### Other items

- A. Date for next meeting: \_\_\_\_\_
- B. \_\_\_\_\_
- C. \_\_\_\_\_
- D. \_\_\_\_\_