

INSERT YOUR LOGO

## CUSTOMIZED REVIEW

### PERSPECTIVE

World  
Markets  
How we work together

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### PROCESS

Plan review  
Portfolio review  
Next steps follow up

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### PRIORITIES

Family and relationships  
Wealth and wellness  
Career and work  
Lifestyle and leisure  
Community and giving  
Other

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# Sample Pre-Meeting Package

## Letter and Agenda

Dear (name of Client(s)),

We look forward to our meeting with you on (Date) via (Technology) from (start time) to (end time).

Please find below the details for our video conference call:

- Join the meeting
  - Click here:** [insert virtual technology meeting link]
  - Dial in:** [insert virtual technology meeting phone number]
  - Meeting ID:** [insert virtual technology meeting ID code]

Please find below a proposed agenda for our meeting. However, this meeting is designed to address the topics that are most important to you—so please don't hesitate to let us know if you would like us to make changes to the agenda. We welcome your feedback!

### AGENDA ITEMS

**1. Check-in:** How are you doing?

**2. Perspectives**

- Review of latest commentary around world event & relevant industry news
- Working with us

**3. Review of your Priorities**

- Family and Relationships
- Health and Wellness
- Career and Work
- Lifestyle and Leisure
- Community and Giving
- Anything additional you would like to discuss

**4. Plan and Portfolio Review**

**5. Next Steps**

Please do let us know if there is anything else that you would like to add to the agenda or if have any questions or concerns. (Team member name) will reach out the day before our meeting to answer any technology questions you may have. We look forward to speaking with you on (date).

Kind regards,

(Advisor name)

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Date of first publication: April 2020 Revised: April 2022

RETAIL-03414 (EXP 04-2023)