

INSERT YOUR LOGO

CUSTOMIZED REVIEW

PERSPECTIVE

World
Markets
How we work together



PROCESS

Plan review
Portfolio review
Next steps follow up

PRIORITIES

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

Sample Pre-Meeting Package

Letter and Agenda

Dear

Dear Mr. and Mrs. Client,

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)

Important Information

Please remember that all investments carry some level of risk, including the potential loss of principal invested. They do not typically grow at an even rate of return and may experience negative growth. As with any type of portfolio structuring, attempting to reduce risk and increase return could, at certain times, unintentionally reduce returns.

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