

PRELIMINARY PLANNING MEETING AGENDA

1. REVIEW FINANCIAL PLANNING QUESTIONS
(10-15 MINUTES)
2. REVIEW SEC ADVISORY DISCLOSURE INFORMATION
3. REVIEW DATA YOU PROVIDED US
4. PRELIMINARY PLANNING STUDY
 - A. PERSONAL FINANCIAL STATEMENT
 - B. CASH FLOW ANALYSIS
 - C. TAX ANALYSIS
5. ANSWER QUESTIONS
6. MAKE RECOMMENDATIONS