

## **“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