[Client Name]
Annual Review Meeting Agenda

[Date of Review]

Topics for Discussion:

1.	**What's New?** » Any life changes, past or future? » Objectives and goals » Cash flow meeting your needs
2.	**Portfolio Review** » Review portfolio accounts » Risk tolerance » Outside assets
3.	**Financial Plan Review** » Specialists: CPAs, JDs, Insurance Specialist, and other professionals » Cash flow analysis: How much can I comfortably spend in retirement? » Develop a Family Index Number » Social Security Analysis » Risk Management Planning
4.	**Tax Planning Considerations**
5.	**Required Minimum Distribution Review** (if necessary)
6.	**Estate Plan and Beneficiary Check-In**
7.	**Wrap-up Q&A**

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8.	**Action Plan** » » » »
9.	**Bucket List Items**
10.	**Feedback: What Can We Improve, Develop or Change for You?**
11.	**Upcoming Client Events**
12.	**Service Offerings and Introductions**

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