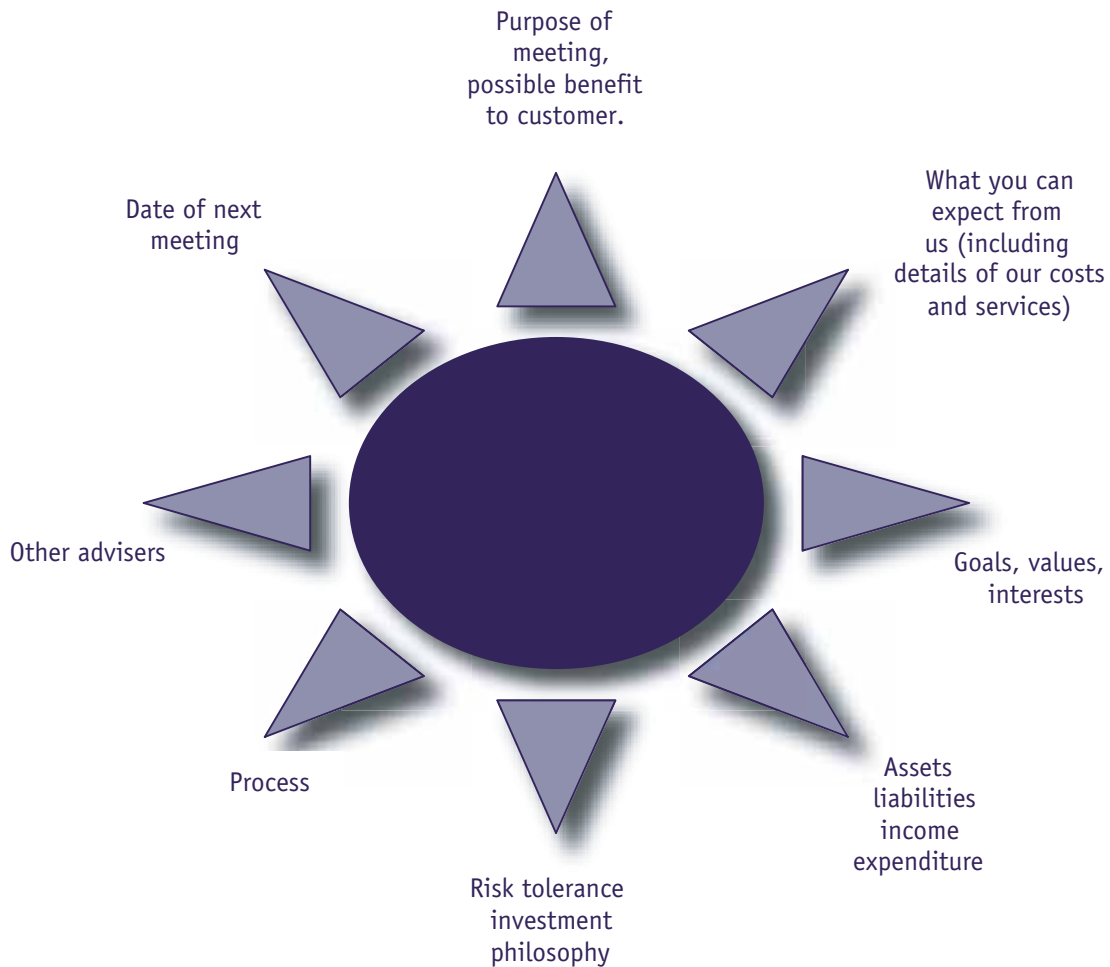


# Possible agenda for initial customer meeting



The topics listed above are examples of some we have seen during visits to firms. This document is merely intended to illustrate the idea of using a meeting agenda and you may prefer to use different headings or a different layout. Some advisers choose not to use a pre-printed fact find and may consider a document of this type to capture sufficient customer information.

**TIP:** A version of this diagram could be used for on-going review meetings with customers.