

New Client Meeting Agenda

Held with: _____

Meeting Date: _____

1. What brings you here today? What was the motivation for you to contact us?

2. How do you think Vue Financial can help you?

3. Getting to know you:

To understand your goals and ambitions we'd like to discuss:

- a. Where you would like to be?
- b. Where you are now?
- c. Have you any experience with Financial Planning up until now? How did you find that?
- d. What are your expectations of the financial planning process?

4. Identify activities to assist in the achievement of your goals

5. Explanation of our fees

6. Next Steps

7. Complete Financial Needs Analyser

8. Assign actions