

Sample Team Meeting with Client

[Date]

[Time]

111 Genesee Street

Meeting called by: Winthrop Financial Inc **Type of meeting:** Annual Review

Attendees: Client(s), Winthrop Financial Advisor(s), Other Professionals

Please read:

Please bring:

Minutes

Agenda item: Specific item asked for by Client; Life style or life goal change

Discussion:

Conclusions:

Action items	Person responsible	Deadline
✓		
✓		
✓		
✓		

Agenda item: Status Report – Review Progress Report, Asset allocation, Investments

Discussion:

Conclusions:

Action items	Person responsible	Deadline
✓		
✓		
✓		
✓		

Agenda item: Cash flow, MRD, Transfer, Paperwork completed

Discussion:

Conclusions:

Action items	Person responsible	Deadline
✓		