



## **PROPOSED AGENDA FOR THE INITIAL FAMILY WEALTH AND ESTATE PLANNING MEETING**

1. Introductions. My story. Firm philosophies. Explanation of Three Levels of Planning.
2. Assurance that YOUR goals and objectives (not ours) are what we plan to attain and that we will only proceed together if there is a fit between your goals and objectives and the service we can provide. What is most important to you?
3. Your story. Information gathering for:
  - Identifying your hopes, fears, values, aspirations, goals and objectives.
  - Preparing and prioritizing the list of your goals and objectives.
4. Discussion of whether we can help you meet your goals and objectives and whether there is a fit between you, your family, and our firm.
  - 4.a. If we both feel there is a fit, identification of which of our Levels of Planning would be right for you and your family and assets – fee range will be quoted at this time.
  - 4.b. If we feel there is not a fit, we will make a referral to someone who can meet your goals and objectives.
5. Discussion of our process under the specific Level of Planning chosen.
6. Designing the plan to meet your goals and objectives.
  - Detailed analysis of your present estate plan.
  - The design of your proposed new Family Wealth and Estate Plan. (This stage may carry over into a subsequent meeting depending on the Level of Planning and time constraints).
  - After the design of your plan is completed, we will determine the exact fee for the plan that will accomplish your goals and objectives.
7. Explanation and Execution of Engagement Letter
8. Schedule Next Appointment (either 2 weeks later if signing meeting or within 1 week if additional design meeting)