



# FINANCIAL LIFE PLANNING CLIENT AGENDA

---

## First Meeting: **INITIAL CONSULTATION**

In our first meeting, we will develop the framework of our game plan. We'll go through a few exercises that have been specially designed to tap into your deepest longings. Don't be surprised if long-buried dreams begin to reveal themselves during this meeting.

## Second Meeting: **EXPLORATION**

We will use the Exploration meeting to sift through the astonishing new universe of joyful opportunities before you. The exercises we use in this meeting will encourage you to focus on the essence of YOU, your current life, and living a life of confidence, secure in the knowledge that you have tapped into the person you were meant to be.

## Third Meeting: **VISION**

In our Vision meeting, we will hone joyful hope into a distinct vision, custom created for you. By the close of this meeting, you will be able to define your personal Life Purpose with clarity and commitment.

## Fourth Meeting: **OBSTACLES**

The word "obstacle" applies to something that stands in the way. Together, we will use this meeting to fearlessly address seemingly mammoth challenges to your new dream of Freedom. We will identify, define, and divide strong "Obstacles" into small, weak, conquerable pieces.

## Fifth Meeting: **KNOWLEDGE**

The Knowledge meeting is a fusion of Vision + Resources. We will use all strategic financial elements at your disposal – now and in the future – to construct a fully "doable" Financial Life Plan that supports your cherished dream of freedom. The Knowledge you will take from this meeting will support your Vision, leaving you with a realistic sense of optimism and hope.

## Sixth Meeting: **EXECUTION**

In this, our final meeting, we will implement your new-found power and purpose. This meeting gives wings to your dreams. You are ready to take control and assume "ownership" of your new life.

- 
- ▮ Meetings last from one to three hours.
  - ▮ We will honor your timetable to complete your plans.
  - ▮ You will receive two separate plans, customized just for you, which we will help you implement: a Life Plan *and* a Financial Plan