# Initial Meeting

Topic of Conversation Checklist

*(in no particular order)*

CLEAR PATH ADVISORY

## From the consumer:

- [ ] Initial thoughts and comments
- [ ] Big picture "goals" and why are you seeking potential guidance
- [ ] Your expectations
- [ ] Your prior experiences

## From Clear Path Advisory:

- [ ] Role we play as independent advisor and why we chose this route
- [ ] Process we drive: Explanation of our planning model and the tools we use
- [ ] Some of our beliefs
- [ ] Why do planning - can you answer these questions (not now, but think about)
  - Where are you now (snapshot of current scenario?)
  - What are you doing currently (how much and where are you "adding" $'s)?
  - Based on where you are and what you are doing, where are you going?
  - Is where you are going, where you want to go?
  - Do you have a means and method of monitoring and overseeing?
  - Do you have a trusted relationship, an objective eye to engage and guide?
- [ ] Strategies and partnering relationships - who is Kestra, Asset Mark & NFS (National Financial Services)
- [ ] Fees we charge / How we are compensated
- [ ] What you can expect
- [ ] Inputs versus Outcomes
- [ ] Explanation of on-boarding a client and what to expect moving forward
- [ ] **Meeting Notes:**



1777 REISTERSTOWN ROAD SUITE 285 PIKESVILLE, MD 21208 TEL 410 486 5242 FAX 410 486 5243 WWW.CLEARPATHADVISORY.COM