

# MEETING AGENDA

## The below items will be discussed during our next meeting:

- Life changes - what's new or different?
- Identify goals for the year
- Tax strategies for the year
- Cash flow and savings
- Investment discussion
- Is there anything else you want to ensure we cover?

### **SKG TEAM AT BARNUM FINANCIAL GROUP**

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Follow us on social media to stay up to date on upcoming events.

