



[Mr. & Mrs. Client]
Review Meeting Agenda

[Date]

- ❖ **Goals and Planning Priorities**
 - Discuss if anything major has changed, if goals have changed
- ❖ **Review & Update Household Asset-Map**
 - Discuss current status relative to goals via Target-Maps
- ❖ **Key Account Information**
 - Review/confirm risk profile
 - Confirm beneficiaries
- ❖ **Risk Management**
 - Review life insurance policies
 - Review disability income insurance coverage
 - Review long-term care insurance coverage
- ❖ **Wealth Management**
 - Review joint and personal investment accounts
 - Review college funding strategy
 - Confirm any needed reallocation of investment accounts
- ❖ **Estate Considerations**
- ❖ **Other** _____
- ❖ **Additional Topics**
 - Enrolling in eDelivery
 - Scheduling the next review
- ❖ **Personal and Professional Recommendations**

Matt Boyles | President & Founder | Financial Advisor
Grand Prairie Financial | 121 West Front Street, Lonoke, AR 72086
Office: (501) 676-5900 | matt@grandprairiefinancial.com

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