Introductory Meeting Agenda

Client: Date:

How we got here

- Introduction to your CERTIFIED FINANCIAL PLANNER™ professional, CFP®
- MetLife and Barnum Financial Group announce corporate alliance. Why Barnum? (click here to learn more)
- What to expect from today's meeting – and your follow-up meeting

Learn more about you

- Besides being complimentary, what brings you here today? What is your most important financial goal or concern for us to discuss? What is on your retirement bucket list?
- What outstanding goals (if any) do you still want to accomplish?

Your preliminary financial information

- Review and organize information already provided (if applicable) – and discuss:

Covering needs

- When did you last review your budget?
- How do your expenses change now that you are retired?
- What big expenses do you need to plan for (e.g., new car, upcoming medical expense, travel)?
- How much have you set aside for emergencies?
- How would you feel knowing these expenses could be covered in retirement?

Creating income

- How do you feel about your current retirement income strategy?
- How do your asset allocations and current investment mix align with your income strategy?
- How does your income change in various market conditions (e.g., inflation, bull/bear market)?
- If you continue your current spending, how confident are you that you will not outlive your money?

Preparing for the unforeseen

- How have you prepared for the impact of an unforeseen event (e.g., death, disability, extended healthcare stay)?
- How do you know if you are adequately protected for one or more of these scenarios?
- When did you last review your insurance policies to assess the adequacy of your coverage?

Leaving a legacy

- When did you last update your:
  - Will?
  - Trust?
  - Power of attorney?
  - Healthcare directive?
- How have recent life changes impacted the desires defined in your estate documents and beneficiary designations?
- How prepared do you feel about leaving a legacy?
- How confident are you that someone will be able to step in and distribute your estate as you wish?

Your vision and goals

- Your goal summary to document what's most important to you
- Your vision for your goal timeline