Wealth Plan Review Agenda

MURPHY FINANCIAL SERVICES

- **Personal Update**
  - Any life changes coming up, or since our last review?
  - What's on your mind?
- **Review the Facts of your Wealth Plan**
- **Review our Observations & Recommendations for your Wealth Plan**
- **Review your Wealth Plan Considerations**
- **Investment Review**
  - Financial Roadmap Alignment
  - Risk Tolerance Alignment
  - Strategy Performance Comparative Review
- **Review Next Steps**
- **Is there anything we can improve, develop, or change to provide you with a better experience?**
- **Schedule your next Financial Check-in Appointment**

Notes:

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