

MEETING AGENDA

INVESTMENT GOALS

BARNUM
FINANCIAL GROUP
THE SKG TEAM

The below items will be discussed during our next meeting:

- Life changes - what's new or different?
- Risk tolerance review and update
- Investment goal tracking
- Capital markets update
- Strategy discussion
- Is there anything else you want to ensure we cover?

SKG TEAM AT BARNUM FINANCIAL GROUP

565 TAXTER ROAD, SUITE 625
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Follow us on social media to stay up to date on upcoming events.

