# Agenda for Get Acquainted Meeting

## Discuss Priorities and Questions

- As you look at your financial future, what are your critical questions?
- What is the most immediate concern or problem that you want to solve?
- What is the most important thing you wish to accomplish in our meeting today?

## Review Information

- Review questionnaire
- Review other information

## Winkler Financial Planning, LLC (WFP)

- The value of working with a NAPFA Registered Financial Advisor and Independent Fee Only Advisor
- Value added: Alignment of Your Risk Strategies with Goals, Risk Reduction Through Diversification, Specific Recommendations for Reducing Expenses and Improving Tax Efficiency, a Road Map for Achieving Your Goals

## Wrap-Up

- Review sample financial plan
- Prepare fee estimate
- Prepare a checklist of additional items needed

## Next Steps in Financial Planning Process

- Step 1 - If Client and WFP decide to proceed, Client provides information and signed Service Agreement
- Step 2 – Collaborate by phone to refine goals and discuss questions
- Step 3 - Analysis and Plan Formulation
- Step 4 - Presentation of your Financial Plan – approximately 2 weeks after data has been received
- Ongoing - Monitor results, answer questions with a check up at least annually to revisit assumptions, goals and rebalance portfolio.