

## Sample Agenda

### **Name of Client**

#### **Summary of assets:**

Home

CD's

IRA's, 401(k), etc.

#### **Summary of income:**

SSI

Pension

Rental, etc.

#### **Desired income:**

\$

Net difference \$

#### **Concerns:**

Describe concerns and point our main concern to begin working on right away. For example; concern of losing money due to stock market loss. Has gained back most of losses and does not want to lose money again.

#### **Recommendation and steps to implement:**

Recommendation to solve their paramount concern and steps to set it up. For example; move a portion of savings to a legal reserve fixed indexed annuity that is regulated by the government. The portion moved should be the amount that is desired to be protected from stock market losses but has the opportunity to participate in stock market increases.