COASTAL

FINANCIAL PLANNING GROUP

Review Agenda

Name

Date

Client since August, 2012

- Discussion of lifestyle/hobbies & Interests, health changes
- Review of beneficiary listings
- Discussion of upcoming personal, family, or critical financial events
- Review and/or completion of Risk Questionnaire and Investment Policy Statement
- Investment market condition review (i.e., bond alternative opportunities)
- Review of goals and objectives (Initial Recommendations by CFPG)
- Review income plan
- Review withdrawals (RMD's if applicable) and the account(s) they are coming from
- Review of performance (YTD/QTR reports & spreadsheets)
- Review of Annuity Index Allocations
- Implementation of changes
- Discussion of Estate Planning and Protection needs
- Discussion of Tax Forward Planning opportunities
- Discussion of upcoming events/calendar
- "Business Builder" program
- Customer Satisfaction Level (1-10; 10 being highest) ________