Location:
2/13/2020

BEACON WEALTH

REVIEW MEETING
Client:

- What is new in your world since we last visited/connected? How is God working in your life right now?

- Are there any Life Transitions or Big Decisions on the horizon that we need to be planning for?

- What are your priorities for the coming Quarter/Year?

- What changes would you like to make in your life or do differently in 2020?

- How do you feel about the progress we have made towards….? What additional info and/or resources do you need to have clarity about your current financial standing?

- What fears or concerns do you have about your future/retiring?

- What is one thing we could do to improve your experience or better serve you?

- Who do you know that would likewise be blessed by the work that we do?

- Interesting Insights:

- Risk Tolerance:

- Verify Email:

Client to Do's

#	Action Items	Due Date	Follow up	Status
1.				
2.				
3.				
4.				

BWC to Do's

#	Action Items	Due Date	Assigned to	Status
1.	Investment Rec as is Y/N			
2.				
3.				
4.				

Prayer Requests Do I Send a Card? Y/N

#	
1.	
2.	
3.	

Next Meeting: