

# Client Summary

**ClientName:** Name Financial Review June 2024

**FinancialWellBeing:** Agenda Financial review 2 Personal & Planning Update Financial Well-being Progress Report Retirement Goals & Check In Market Outlook Our Strategy

**KeyWins:** Personal update Financial review 3 To make today's meeting worthwhile, you would like to cover: Today we will be addressing your worries and concerns regarding: What's gone well since we last spoke? What's been keeping you busy lately? What's changed in your life (and your family's lives) since we last spoke? Any changes to your health or your family's health? Any new financial goals? How would you prefer to receive a copy of this Financial Review?

**Goals:** Information review Client 1 name Are there any changes to the information below? Best phone #: Address: Email address: Employer and title: Employer location: Length of time at job: Current income: BCDL: KYC UPDATE REQUIRED: 4 Financial review

**EstatePlanning:** Information review Client 2 Are there any changes to the information below? Best phone #: Address: Email address: Employer and title: Employer location: Length of time at job: Current income: BCDL: KYC UPDATE REQUIRED: 5 Financial review

**YourTaxRates:** Personal contact Client 1 name DELETE IF NO KYC REQUIRED TCP: TCP Relationship to Client: TCP Email or Phone #: Assets combined with spouse? 6 Financial review

**NetWorth:** Personal contact Client 2 name TCP: TCP Relationship to Client: TCP Email or Phone #: Assets combined with spouse? 7 Financial review

**AssetAllocation:** Contact preferences What is your preferred form of communication? Telephone email text How often do you want us to meet? Quarterly semi- annually annually What is your preferred way to meet? In person zoom no preference Are you signed up for client portal access? Yes No I would like assistance Are you signed up for our monthly newsletter? Yes No I would like assistance 8 Financial review

**InvestmentTaxAllocation:** YOUR Financial team Taxes: Legal updates: Banking: Loans, lines of credit, mortgages: Life, Disability & Critical Illness Insurance: 9 Financial review

**Homework:** 10 Financial Review Net worth Table