THE REVIEW MEETING CHECKLIST

GATEWAY FINANCIAL PARTNERS

We understand that investors want mutual preperation for review meetings. They have complex lives in motion. They need time to review everything that has happened in their lives since the last meeting. This checklist is designed to help.

860.652.4360

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LIFE CHANGES

- [ ] Work
- [ ] Household Income
- [ ] Household Expenses
- [ ] Household Debt
- [ ] Posessions: purchase/sale/loss/gain
- [ ] Bank/financial accounts
- [ ] Residences
- [ ] Health of you and your family
- [ ] Marital or family status
- [ ] Dependents
- [ ] Other

SERVICE SATISFACTION

- [ ] Your convenience in working with us
- [ ] Your online account access

INVESTMENT SATISFACTION

- [ ] Your investments are not performing as expected
- [ ] Your risks are not in-line with expectations
- [ ] The markets have caused you to rethink your investments
- [ ] There are other investments you would like to discuss

FINANCIAL PLANNING AND SERVICES UPDATE

- [ ] Your financial plan needs to be updated
- [ ] Your loans/mortgage may not be cost effective
- [ ] Your insurance coverage may not be appropriate
- [ ] Your estate plan needs to be updated
- [ ] Your charitable giving strategy needs updating
- [ ] Your children/grandchildren's finacial needs have changed
- [ ] Your investments may be exposed to excessive taxes

THE REVIEW MEETING CONVERSATION GUIDE

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The review meeting conversation flow is designed to provide a review meeting that clients want.

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HEAR FROM THE CLIENT

History ("What has happened since our last meeting?") *"Are you more or less confident about your finances since we last talked?"*

Transitions ("What is happening now?") *"Is anything happening now that could impact your financial future?"*

Principles ("How did you get here?") *"What has changed about your financial attitudes since we last met?"*

Goals ("Where are you going?") *"How do you feel about the long-term goals we talked about in our previous meetings?"*

REVIEW/PREVIEW HOLDINGS

Review current portfolio

Discuss results

Discuss future opportunities

REVIEW SERVICES

Review current services

Review future service needs