

VALUES / CONCERNS

Recommendations or follow-up:

MONEY

Recommendations or follow-up:

CONVERSATION SUMMARY & RECOMMENDATIONS

CLIENT NAME

DATE

FAMILY

Recommendations or follow-up:

LEGACY

Recommendations or follow-up:

LIFESTYLE & HOBBIES

Recommendations or follow-up:

OTHER RELATIONSHIPS

Recommendations or follow-up:

YOUR CURRENT TEAM

Recommendations or follow-up:

SERVICE EXPECTATIONS

Recommendations or follow-up:



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