MEETING CHECKLIST

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Review meeting preparation—topics for conversation

Review the items below that may have changed since our last meeting. This is designed to make the review meeting as efficient and productive as possible and to help make sure that your financial plan is always aligned with your situation.

Check the issues below that you would like to address in our next meeting:

☐	Life Changes
☐	Work
☐	Household income
☐	Household expenses
☐	Household debt
☐	Possessions: purchase/sale/loss/gain
☐	Bank/financial accounts
☐	Residence(s)
☐	Health of you and your family
☐	Marital or family status
☐	Dependents
☐	Other

☐	Service Satisfaction
☐	Your convenience in working with us
☐	Your online account access

☐	Life Changes
☐	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

☐	Investment planning and services update
☐	Your investment plan needs to be updated
☐	Your insurance coverage needs to be reviewed
☐	Your estate plan needs to be updated
☐	Your charitable giving strategy needs updating
☐	Your children/grandchildren’s financial needs have changed
☐	Your investments may be exposed to excessive taxes

Guy Keith Rodgers - LPL Financial Advisor
1105 Alexis Ct., Suite 103
Mansfield, TX 76063

P: 817-225-4805 | **M:** 817-366-6418 | **F:** 817-225-4804
guy@grpws.com | www.grpws.com

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