

# Review Meeting Agenda Template

*Your company name here*

*Your  
logo  
here*

*Financial Health Check: Insert client name*

*Date: Insert date*

---

*1. Your issues: an update by you on issues requiring attention*

---

---

*2. Strategic review: an update by your adviser on recommended changes to strategy*

---

---

*3. Investment review: looking back on the last 12 months performance*

---

---

*4. Action plan: looking forward and implementing any changes to investment strategy*

---

---

*5. Debt review: reviewing your interest rates and debt structuring arrangements*

---

---

*6. Taxation update: reviewing opportunities and threats created by changes to taxation law*

---

*Your contact details here*

*Mini logo*

*Advise Better  
Live Better*

## Review Meeting Agenda Template

---

*7. Pensions update: reviewing opportunities and threats created by changes to pension law*

---

---

*8. Insurance review: providing a check of current levels of cover and policy wording*

---

---

*9. Estate planning review: ensuring your estate planning wishes are current and legally valid*

---

---

*10. The remove the hassle service: sorting through any paperwork received that confuses you*

---

---

*11. Family review: discussing any financial issues affecting your family*

---

---

*12. Professional update: providing professional updates to your accountant and other advisers*

---

---

Your contact details here

Mini logo