

Initial Meeting Agenda

What was it that brought you in to see us today?

Thanks for that. Would you mind if I took a few minutes to explain who we are and how we work. We'll get that out of the way and then spend our time looking at your situation.

Provide brief overview of what you do, who for and what is Financial Planning. (2-3 mins tops)

Financial Overview

Can you give me an overview of your current financial position? (looking for the hard info here – draw the answers in boxes on the white board or a page).

Do you own a home? What's it worth roughly? Do you have any debt? What do you owe on it?

Any other property? If yes, what debts are still owing on these properties?

A pension fund? What's it worth roughly? (Explore any other technical angles briefly but don't get bogged down here)

Any shares? Other investments?

How do you evaluate investments before you buy them? Why did you buy this one? (Pick one) Has it done what you wanted it to do? Why/why not? What about this one? (Pick another) Has it done what you wanted it to do? Why/why not?

What's your occupation? What's your salary package or drawings?

Do you know how much money you need to live on?

What age are you? Any children? Their ages?

If a business owner:

What does the business turnover? What does it make as genuine profit? Is that before or after you take your remuneration? How do you take your remuneration; as salary or dividends?

What do you believe the business is worth if you wanted to sell it? Is there any debt secured against the business? How dependent on you is the business for its success? (If you couldn't work in it from tomorrow how would it go? What could you sell it for in a fire sale without you in there?)

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Level 2 Questions

Where would you like to get to financially? Why is that important to you?

What value can I add?

What are the criteria for a good solution? OR What does good look like as an outcome here?

Is there anything we can't do?

What are the implications of doing nothing?

What have you thought of already?

What else is occurring in your life that might impact this work we're considering?

What concerns do you have about resolving this issue? (or any other issues?)

How will you measure our performance?

Power Questions

George Kinder:

1.) Imagine you are financially secure, that you have all the money in the world. How would you live your life? Would you change anything? Let yourself go. Don't hold back. Describe a life that is complete for you.

2.) Now imagine that you visit your doctor, who tells you that you have only 5 - 10 years to live. You won't ever feel sick, but you will have no notice of the moment of your death. What will you do in the time you have remaining? Will you change your life and how will you do it? (Note that this question does not assume unlimited funds.)

3.) Finally, imagine that your doctor shocks you with the news that you only have 24 hours to live. Ask yourself: What did you miss? Who did you not get to be? What did you not get to do?

Dan Sullivan:

"If we were sitting here in 3 years time and looking back on the last 3 years, what would have to have happened both personally and professionally for you to feel happy with your progress? Specifically, what dangers would you like to eliminate? What opportunities would you like to capture? And what strengths would you like to maximise?"

Finish With

After you leave today is there any other question that you will wish I had asked you? (basically, you are asking is there anything else you should know)

Trial Closing Question

If I could put a plan together that addresses:

- a.)
- b.)
- c.)

and deals with it all in a cohesive way would you feel like you've come to the right place?

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