

Your first-meeting checklist

A few thoughts and questions are enough to begin.

Think about what matters

- ☐ What would you like your money to make possible?
- ☐ Which question or upcoming decision needs attention?

Questions you might ask

- ☐ How would you approach my priorities?
- ☐ What services would be involved, and how are you paid?
- ☐ How would we communicate and review progress?
- ☐ What would happen after this meeting?

If useful to you

- ☐ Have a broad picture of your savings, debts, income and business interests in mind.
- ☐ Note anything you want explained or anyone you would like involved.
- ☐ Confirm the date, time and meeting format.

Keep private documents with you until we agree on a suitable way to share them. Checklist selections are not submitted or saved by the website.