HH

Wealth Creation

agenda

Discovery Meeting

Date and Time.

Meeting called by: Christopher Holme

Attendees:

Please bring: Super statements, life insurance policies, pay-slips, bank statements and tax returns

I believe good financial advice is a series of smart financial decisions made over time to help you achieve your personal and financial goals.

My aim is to join you on your journey and help you make these decisions so that you can spend time focusing on what is most important to you.

5 Minutes	**Introduction** Introduction to myself and HH Wealth Creation and our values
20 - 30 Minutes	**Fact Find** This section will be about finding out about you. I will be asking about the following areas: - Names and Ages - Marital and Family Situation - Employment and Incomes - Structures (Company, Trusts etc.). - Assets and Liabilities (Property, Investments, Super, Loans etc.). - If you have children, schooling costs or proposed costs - Budget and cash flow - Estate Planning provisions
20 - 30 Minutes	**Goals** This section will be about finding out where you are going: - 5 – 10 Year Goals - Retirement Goals - Core Values and Beliefs - Expectations - Legacy (what you want to be remembered for) - Family situation(ie. parents, aged care, dependency, estate/inheritance)

HH

Wealth Creation

agenda

10 – 20 Minutes	**Potential Strategies/Ideas and Time Frames/Process** This section will be some proposed strategies on how we can put you in a better position. We will also discuss the following: - The financial planning process - Time frames - Expectations and outcomes - Cost of advice
5 – 10 Minutes	**Question and Answer Time** We will also discuss who your circle of influence is and where we can help: - Bank - Accountant - Solicitor - Broker - Realtor

Please be advised this agenda is not strict on topics nor time, please contact me if there is anything else you would like to add.