**AGENDA FOR EXPLORATORY MEETING**

***<Meeting time>***

***<Meeting date>***

***<Business name>***

***<Business address>***

**1. Welcome, introductions and meeting objectives**

**2. Your story**

* Your current circumstances
* What’s important to you
* What advice you believe you need
* Anything else you would like to discuss

**3. How we help**

* A brief overview of our business and how we can potentially help you
* How we work together
* The roles of our team
* What we can expect from each other

**4. Questions and next steps**

* Anything that is on your mind
* The next steps to keep moving forward

**5. What to expect**

* Additional basic information that we need to collect
* Date and time for our next discussion to be agreed, if appropriate