**AGENDA FOR PROGRESS REVIEW MEETING**

***<Meeting time>***

***<Meeting date>***

***<Business name>***

***<Business address>***

**1. Welcome and catch up**

**2. What has changed since we last met?**

* Changes in personal circumstances
* Changes in what you want to do or achieve
* Update of current financials; and
* Changes in legislation, economic, political or market conditions that are relevant to your situation.

**3. Reviewing your progress**

* Overview of your current situation and how you are tracking:
  + <Funding your lifestyle after full time work>
  + <Protecting your family>
  + <Paying for your new home>
* What changes or recommendations need to be made?

**4. Outstanding issues or actions from our last meeting**

* <Updating your will>
* <Funding further education for your children>
* <Funding aged care for your parents>

**5. Questions and other issues**

* Questions and queries
* Any other issues
* The next steps – where to from here.