

**TOOL 6.1.4:** Agenda for progress review meeting | Progress review meeting client information pack

**PURPOSE:** An agenda for the progress review meeting discussion. To be forwarded with the progress review meeting information pack 21 days prior to the meeting.

*\*Client facing tool to be cut below the dotted line and embodied into personalised branded document*

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## 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.