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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| http://www.google.ca/url?sa=i&source=images&cd=&ved=0CAUQjBw&url=http%3A%2F%2Fromulus.lib.mi.us%2Fwp-content%2Fuploads%2F2014%2F11%2Fcalendar.jpg&ei=yfH-VMbQKsmhgwSVkoDwAQ&psig=AFQjCNFmNZz5BfDPvCJY3Qz1GwUWRP44_w&ust=1426080585771302Dear | This is a reminder of your appointment with Joe Advisor, Wealth Manager at XYZ Wealth Management on:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  DAY / MONTH / TIME | | | | | | | |
| **AGENDA** | | | | | | | | |
|  | | | | | | | | |
| **SERVICE** | **TOPIC** | | | | | | | |
| **Retirement Planning** | Pension | 🞎 | CPP/OAS | 🞎 | Living Expenses | 🞎 | Long-Term Care | 🞎 |
| **Estate**  **Planning** | Will/POA | 🞎 | Beneficiaries | 🞎 | Business Succession | 🞎 | Charitable Giving | 🞎 |
| **Tax**  **Planning** | Tax Strategies | 🞎 | Business Tax Planning | 🞎 | Foreign Assets | 🞎 | Personal Tax Planning | 🞎 |
| **Risk Management** | Pre-mature Death | 🞎 | Disability | 🞎 | Critical Illness | 🞎 | Asset Protection | 🞎 |
| **Non Financial Advice** | Life Transitions | | Divorce | 🞎 | Eldercare | 🞎 | Bereavement | 🞎 |
| Second Marriage | 🞎 | Sudden Wealth | 🞎 |  |  |
|  | | Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |  |