Advisor First Meeting Invitation & Agenda

The meeting with a prospective client begins long before the actual event time. Their perception of how the meeting will go begins to take shape in their mind from the moment they've agreed to it. That's why you should be intentional and use clear communication to set expectations with an agenda.

Here's a sample of a first meeting agenda to consider sending in the meeting invite; tailor it as necessary to work for your purposes.

Meeting Invite Subject Line:

Introductory Call with [advisor or practice name]

First Meeting Agenda

1. Your key questions, concerns, and goals for financial planning
2. How we'll work with you to solve for your ideal future
3. Any follow-up questions you may have
4. Next steps

Want to learn more about how eMoney's solutions can support you in your planning journey? Visit emoneyadvisor.com or call 888-362-4612.