MERIDIAN
WEALTH MANAGEMENT, LLC

Semi-Annual Review Agenda

Client Name

Do you have anything to discuss – questions, concerns, or “hot topics”?

Review Financial Plan on file with below: (update in meeting)

Discuss Income, current and future. Expenses. Any changes/needs?

Discuss current portfolio allocation and market expectations

Determine client market risk profile (with current volatility)

Recommended allocation, if any changes –

Annuity conversation – performance if they have one – are they interested in one – if they don’t

Tax conversation (current vs future) Accountant?

Trust and Estate planning conversation. Attorney?

Confirm email address and contact info, and receipt of my weekly Tuesday Talk emails

Adjourn