

Annual Renewal Meeting

Especially prepared for:

Our Client

July 5, 2006

Company

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Agenda

1. Your Agenda Items
2. Life Update
 - Family
 - Work/Play
 - Health
 - Personal
3. Year in Review
4. Update of Financial Statements
5. New Goals for 2006 and Beyond; Transitions
6. Financial Freedom Analysis (Probability of Success)
7. Investments
8. Financial Plan Updates
9. Financial Policies Review
10. Action Items and Scheduling