

**PROPOSED AGENDA FOR  
YOUR ACHIEVE YOUR DREAMS PLANNING SESSION™**

1. Introductions. My story. Firm philosophies. Short Explanation of Achieve Your Dreams Custom Estate Planning Packages.
2. Assurance that YOUR goals and objectives (not ours) are what we plan to attain and that we will only proceed together if there is a fit between your goals and objectives and the service we can provide. What is most important to you?
3. Your story. Information gathering for:
  - Identifying your hopes, fears, values, aspirations, goals and objectives;
  - Preparing and prioritizing the list of your goals and objectives.
4. Discussion of whether we can help you meet your goals and objectives and whether there is a fit between your family and our firm.
  - 4.a. If we both feel there is a fit, identification of which of our Achieve Your Dreams Custom Estate Planning Packages would be right for you and your family – fee range will be quoted at this time.
  - 4.b. If we feel there is not a fit, we will make a referral to someone who can meet your goals and objectives.
5. Discussion of our Easy Four Step Process for completing your selected Achieve Your Dreams Custom Estate Planning Package.
6. Designing your Achieve Your Dreams Custom Estate Plan to meet your goals and objectives.
  - Detailed analysis of your present plan.
  - Designing your new plan. (This stage may carry over into a subsequent meeting depending on which Achieve Your Dreams Custom Estate Planning Package you've chosen).
  - After the design of your plan is completed, we will determine the exact fee for the plan that will accomplish your goals and objectives.
7. Explanation and Execution of Engagement Letter.
8. Schedule all remaining steps in our Easy Four Step Process.