



Location: Address or Room Number

Date: Date

Time: Time

Agenda

I. Review Key Objectives

- a) Better understand _____'s business characteristics, processes, and goals
- b) Assess the possibility for a strategic alliance

II. Value Propositions

- a) _____
- b) Advanced Wealth Strategies – Independent, fee-based, fiduciary, CFP™

III. Ideal Client Profile

- a) _____
- b) Advanced Wealth Strategies
 - i) Business owners
 - ii) Non-profit employees (UM, Michigan Medicine, MSU, K-12)

IV. Identity Preferred Referral Process

- a) _____
- b) Advanced Wealth Strategies –Preferred introduction
 - i) Preferred introduction
 - ii) Onboarding process & deliverable
 - iii) Continued relationship experience

V. Action Items

Items	Owner(s)	Deadline	Next Step