



Client Name

	Steps for Project	Homework
Meeting 1 (xx/xx/20xx)	Paperwork Organization & Goals For Project	TBD
Analyze	Dan will analyze your current financial situation (savings, income, and debt) through Financial Planning software.	
Develop Options	Dan will develop recommendations and the pros-and-cons of your options in a written report regarding this Financial goal.	
Meeting 2 (xx/xx/20xx)	Go Over Report & Options	Agreed Upon Action Step & Payment Due
Check In (xx/xx/20xx)	Dan will check-in with you at an agreed upon time to hold you accountable.	

	Table Of Contents	Relevant Program Links
	Topic Addressed & Accomplished	Zoom Video Chat
	Topic Addressed & In Works	Advizr
	Topic Postponed	dan@wellroundedsuccess.com



Client Name

Meeting 1 Agenda: day of week, month date, 20xx

Zoom Video Conference Link

Project	Homework
Paperwork Organization & Goals For Project	TBD

Logistics

One Back-and-Forth Question Each
Google Doc Sheet as Hub
Docusign, ScheduleOnce, & Zoom feedback and questions?
Contact Information: Street Address, Phone Numbers, Emails
Next Meeting & Payment Schedule (xxxx)

Meeting Action Items

Any Pressing Concerns?
Questions about Program
What does a successful program look for you? (xxxx)
Data Gathering with Advizr Financial Planning Software
Current Spending with Mint.com or Online Bank (xxxx)

Homework

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Client Name

Meeting 2 Agenda: day of week, month date, 20xx

Zoom Video Conference Link

Project	Homework
Go Over Report & Options	Agreed Upon Action Step & Payment Due

Logistics

One Back-and-Forth Question Each
Check In Date (xx/xx/20xx)

Meeting Action Items

Any Pressing Concerns?
Go Over Last Meeting's Homework
Advizr Financial Plan (Current Accounts, Net Worth, and Cash Flow)
Recommended Action Steps (xxxx)

Homework

Pay \$400.00 to Well-Rounded Success (Mailed Check: Well Rounded Success, 1001A E. Harmony Rd., #25, Fort Collins, CO 80525)
Agreed Upon Action Steps
Date for Dan to check-in about progress

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