Client Review Meetings
Strategic and Tactical Plans

What are your overall goals for your practice? What are you working on to enhance your client experience?

What is the purpose of your client review meeting? If you have more than one, prioritize them. How does this purpose (do these purposes) support your practice goals?

How often do you meet with your best clients?

Think about some of the best meetings you have had with your best clients. Identify the client and the meeting topic for a few of these best meetings. Can the agenda that was followed be a template for your standard meeting?

If you meet frequently enough to rotate financial planning agenda items, what is the rotation of the agenda items?

Each quarter, consider news items that could become part of this quarter's meetings. Is the news media focused on a planning technique or tool? Are there trends in the economy or investments that your clients may want to discuss?

Additional resources: http://www.jcomerconsulting.com/client-review-meeting