LET'S PREPARE FOR YOUR 2ND MEETING

- Bring list of questions and concerns that you'd like to address with the Banker and Wealth Manager. Immediate needs list is a priority, if you want assistance in payments being made anonymously

- Compile additional projects you have, if any, to let your management team know your vision

WHAT TO EXPECT AT 2ND MEETING

Meet Your Banker, Wealth Manager and Support Staff ~ To Discuss Fees, Services, Benefits

- Talk about a Project Manager that will assess your personal needs and arrange the appropriate subcontractor(s) to carry out your desires and build your individual team (based on fee structures you'll agree/sign)

- Discuss specific wishes and ask questions pertaining to your current Revocable Trust and future entities you may need.

- Discuss Family Governance Project and other Projects submitted in RV Meeting #1

WHAT TOPICS MAY BE DISCUSSED

- Personal Priorities - i.e. banking/cash management, retirement, investing, taxes (as appropriate), family legacy planning, personal finance, health and insurance
- Security and Risk Management - *important discussion*
- Additional projects and reasonable timelines
- Schedule Orientation classes, as they are available

CLOSING REMINDERS

- Be authentic, truthful, and heartfelt in your conversations
- Don't feel rushed or pressured…try to stay calm. They are going to work FOR YOU!
- Plan your 2nd RV appointment when others that couldn't attend the 1st RV meeting might accompany you, if necessary. Prepare ahead and bring list of follow up questions and stay focused and to the point. *Let them suggest a plan of action.*
- Set a schedule to make further appointments, as needed and recommended by your Banker and WM. *Family members will need their own meeting*.
- Remember: All representatives of the Trust Company or Private Bank and the Wealth Manager Staff have been vetted and are likeminded in wanting to bring hope and change for the world, now, and for future generations…..JUST LIKE YOU!