



Planning Audit™ Agenda

1. Review Agenda & Purpose of Meeting
2. Review Planning Process Overview
3. Assess Current Situation
4. Clarify Planning Goals
5. Review Common Planning Traps You May Fall Into
6. Audit Current Situation
 - a. Identify Dangers Facing Family
 - b. Identify Overlooked Opportunities
 - c. Review Areas of Strength to Reinforce
7. Recommend Planning Process & Fees
8. Review What We Have Accomplished
9. Determine Next Three Action Steps