

# Wealth Management Meeting Tracker

	CLIENT OR PROSPECTIVE CLIENT						
Discovery Meeting	Meeting Booked						
	Confirmation Letter Sent						
	Agenda Prepared						
	Date Meeting Held						
	Follow-up Letter Sent						
Investment Plan Meeting	Meeting Booked						
	TCP Mind Map Complete						
	Investment Plan Completed						
	Agenda Prepared						
	Date Meeting Held						
	Follow-up Letter Sent						
Mutual Commitment Meeting	Meeting Booked						
	Agenda Prepared						
	Date Meeting Held						
	Follow-up Letter Sent						
45-Day Follow-up Meeting	Meeting Booked						
	Agenda Prepared						
	Date Meeting Held						
	Follow-up Letter Sent						
Regular Progress Meeting	Meeting Booked						
	Client Case Presented at Professional Network Meeting						
	Advanced Plan Completed						
	Agenda Prepared						
	Date Meeting Held						
	Follow-up Letter Sent						