

## Annual Strategy Meeting Agenda Items

### **Deliverables**

- Market commentary
- Tax law changes, legislative update
- One-Page Financial Plan Summary
- Quarterly Performance Report
- Tax Checklist
- Guardrails Report, if applicable
- RMD vs. Actuals, if applicable
- Action Items / Open Items Report

### Items to request

- Tax Return
- Estate Plan Documents
- Risk Tolerance Questionnaire
- Beneficiary Info (run report from Envestnet)