

From: Michael Reynolds (Fellow) no-reply@fellow.app
Subject: Michael has sent you the agenda for an upcoming meeting
Date: October 6, 2022 at 1:46 PM
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Here is the agenda for your upcoming meeting



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Oct 7 - Oct 11

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Discussion Items

•TBD

Money Brief

- ☐ Statement of financial purpose
- ☐ Strengths
- ☐ Challenges
- ☐ Opportunities
- ☐ Threats
- ☐ Priorities

Discuss Investment Questionnaire

- ☐ Discuss results

Next Steps and Action Items

- ☐ Schedule Plan Review meeting: <https://calendly.com/elevationfina>

[ncial/planreview](#)



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