

**From:** Michael Reynolds (Fellow) no-reply@fellow.app  
**Subject:** Michael has sent you the agenda for an upcoming meeting  
**Date:** October 6, 2022 at 1:43 PM  
**To:** michael@elevationfinancial.com

MR

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## Here is the agenda for your upcoming meeting



### Sapphire Mastermind Group

Oct 12, 1:30 - 3:00 PM

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## Discussion Items

•TBD

## Walk through RightCapital and fill in gaps

- ☐ Family
- ☐ Income
- ☐ Expenses
- ☐ Bank accounts
- ☐ Credit cards
- ☐ Retirement/investment accounts
- ☐ Savings rates
- ☐ Stock
- ☐ Property
- ☐ Businesses
- ☐ Loans
- ☐ Will / Trust / Estate docs

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- ☐ Life insurance
  - ☐ Disability insurance
  - ☐ LTC
  - ☐ Health insurance (is premium over 10% of gross income?)
  - ☐ Investment account statements
  - ☐ Auto & home declarations pages
  - ☐ Latest tax return

## Get account transfers and investment started

- ☐ Get new accounts open
- ☐ Prep with instructions on transfer process
- ☐ Prep with instructions on Investment Questionnaire

## Set up next meeting

- ☐ Schedule Goal Exploration session: <https://calendly.com/elevationfinancial/goalexploration>



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