

Estate Planning Meeting Agenda

Date: [Insert Date]

Time: [Insert Time]

Location: [Insert Location]

Attendees:

- [Beneficiary Name 1]
- [Beneficiary Name 2]
- [Attorney Name]
- [Other Relevant Parties]

Agenda Items:

1. Welcome and Introductions
2. Overview of Estate Planning Objectives
3. Review of Current Estate Documents
4. Discussion of Assets and Liabilities
5. Distribution Plans and Beneficiary Designations
6. Tax Implications and Planning Strategies
7. Q&A Session
8. Next Steps and Follow-Up Actions

Closing Remarks:

Thank you for your participation and input in this important meeting.

Contact Information:

[Your Name]

[Your Phone Number]

[Your Email Address]