

Financial Goal Setting Meeting Agenda

Date: [Insert Date]

Time: [Insert Time]

Location: [Insert Location]

Agenda Items

1. Welcome and Introductions
2. Review of Previous Financial Goals
3. Discussion of Current Financial Status
4. Setting New Financial Goals
5. Strategies for Achieving Goals
6. Assigning Responsibilities
7. Next Steps and Action Items
8. Open Forum for Questions and Suggestions
9. Closing Remarks

Attendees

- [Participant 1]
- [Participant 2]
- [Participant 3]
- [Participant 4]

Thank you for your participation!