MEETING AGENDA

Our conversation

Cooper & Susan Sample

DATE
2026-07-15

ADVISOR
Dan Mueller

WHAT WE'LL COVER

1. **Review recent investment notes**
   We'll walk through the latest notes and any updates that may affect the current investment plan.

2. **Mid-year portfolio check-in**
   A review of how the household's investments have been tracking since the last meeting.

3. **Update on planning items from the last meeting**
   We'll revisit the key follow-ups and confirm what still needs attention.

4. **Consider any changes to the plan**
   We'll discuss whether recent life, income, or household updates call for adjustments to the plan.

5. **Questions and next steps**
   We'll close by confirming open questions, priorities, and any follow-up items.

YOUR PORTFOLIO AT A GLANCE

Cash	$117,568
Taxable	$496,448
Retirement	$1,413,173
Business	$8,000
Real Estate	$650,000
529 / Education	$14,000
Life Insurance	$47,474
TOTAL	**$2,746,663**

NOTES