

NORCO COLLEGE

Norco Legacy Planning Retreat
August 11, 2016
9:00am-12:00pm
STEM Center-125

T. Client's Goals

- 50. Appropriate retirement
- 500. Appropriate education expenses
- 75. Appropriate insurance
- 75. Appropriate taxes

- a. Client's financial goals
- b. Client's financial needs
- c. Client's financial resources
- d. Client's financial risks
- e. Client's financial opportunities

- a. Open Forum
- b. Ad Hoc

Client's Goals

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Client's financial goals, needs, resources, risks, and opportunities. Client's financial goals, needs, resources, risks, and opportunities. Client's financial goals, needs, resources, risks, and opportunities.

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