**Meeting With X Firm**

**Welcome!** We’re excited to meet with you and discuss how we can help you achieve your financial goals at [date] and [time]. To make your visit as smooth as possible, here are a few details to know before our meeting:

**1. Logistics: Directions and Parking**

* **Office Location**: [Provide clear directions, e.g., "We are located at 123 Main Street, Suite 200, near the intersection of Main and Oak."]
* **Parking**: [Insert specific parking instructions, e.g., "Parking is available in the lot adjacent to the building. Enter through the main entrance and take the elevator to the second floor."]

**2. Meeting Flow**

* **Length:** Plan for this meeting to last approximately 60 minutes.
* **Purpose**: The goal of this first meeting is to discuss what brought you in and determine if we are a good fit to work together.
* **Structure**: We will spend most of the time discussing your current financial situation, your goals, and answering any questions. At the end, we will give an overview of our services.
* **Outcome**: By the end of the meeting, we’ll both have a better sense of whether it makes sense to move forward.

**3. What to Bring or Prepare**To make the most of our conversation, you may want to review or have on hand:

* Recent bank or brokerage statements
* Your latest tax return
* Information about any loans or mortgages

**4. What Not to Worry About**

* **Dress code:** Come as you are!
* **Obligations:** This meeting is just a get-to-know you conversation. At the end of the meeting, you will not be asked to make any immediate decisions. We encourage you to take your time and think things over. Relax and know this is a stress-free zone.

We look forward to meeting with you! If you have any questions before the meeting, feel free to reach out to us at [insert contact information].