



Keystone Asset Management Strategies

AGENDA

Discovery II Meeting

I.	Process Overview	3 minutes
II.	Summary of Items Needed Review	3 minutes
III.	Goals, Goals, Goals	10 minutes
IV.	Life is Expensive and Uncertain	10 minutes
V.	Linkages Review	3 minutes
VI.	Health Concerns Review	5 minutes
VII.	Estate Concerns Review	15 minutes
VIII.	Value Assessment	15 minutes
IX.	Schedule Next Meetings	5 minutes