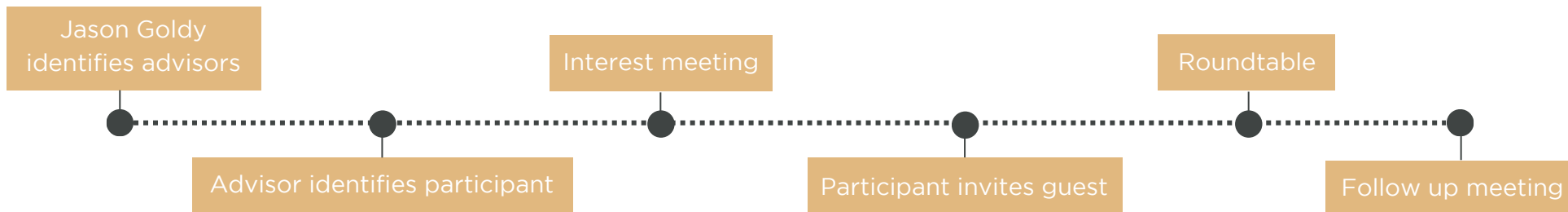




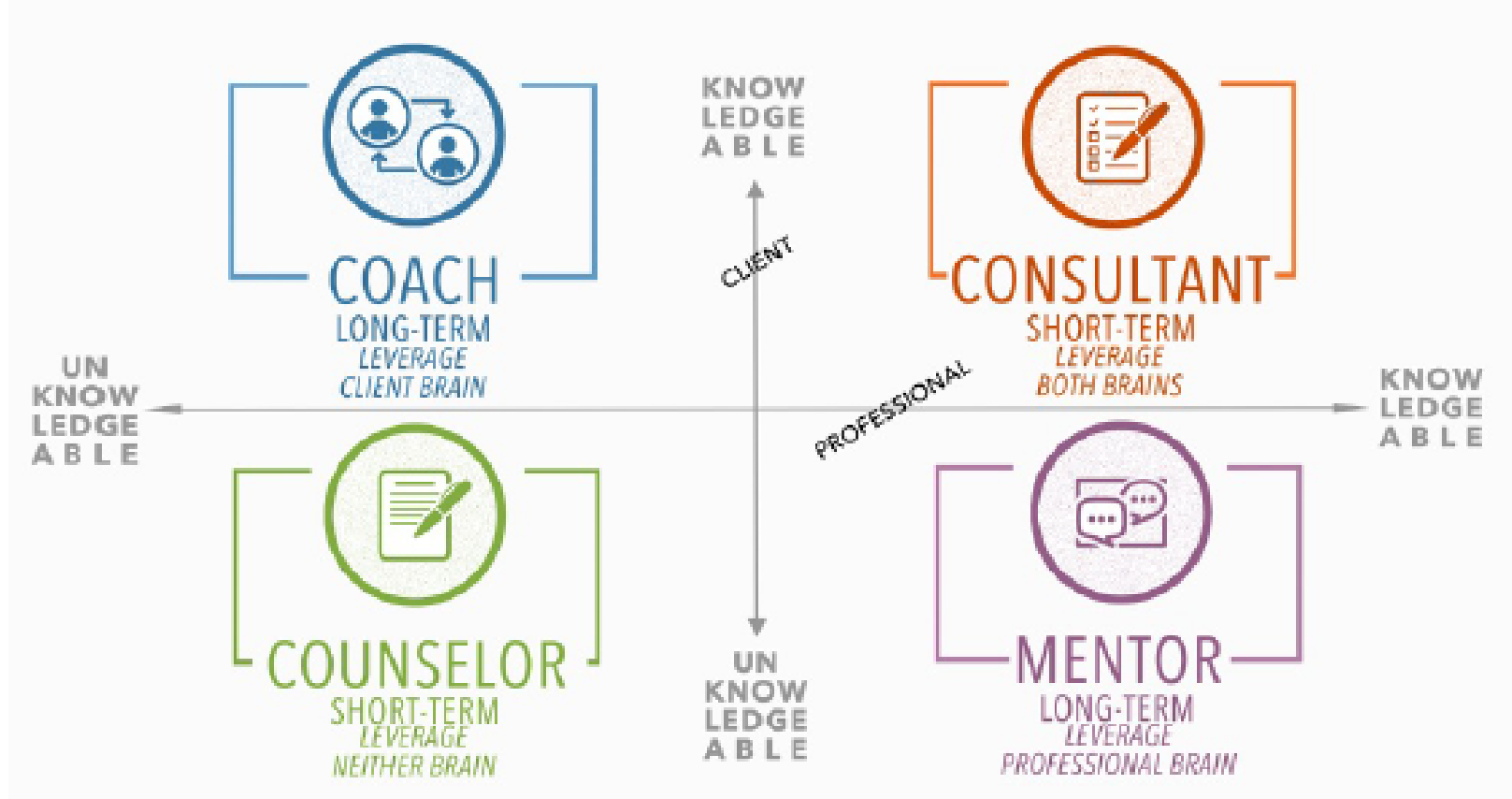
BUSINESS PLANNING

ROUNDTABLE TOOLKIT

WHY / WHAT	ADVISOR RESOURCES	PARTICIPANT DOCUMENTS	GUESTS
<ul style="list-style-type: none">• Purpose• What it looks like + ideal audience	<ul style="list-style-type: none">• Who to invite?<ul style="list-style-type: none">◦ Scripts• Interest meeting• Event logistics• Follow up	<ul style="list-style-type: none">• What to expect• Know before you go• Follow up meeting	<ul style="list-style-type: none">• Guide for participants<ul style="list-style-type: none">◦ what to expect◦ know before you go



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