

JANET LEVINE

CONSULTING

MEETING PLANNER

Meeting with: _____

Others attending: _____

Purpose of the meeting:

Initial meeting Cultivation Solicitation Stewardship

Other (Be Specific) _____

Hoped for outcomes:

What is needed for the meeting? (*things to bring, information to have on hand*)

What things do I need to learn about this prospect?

What do I need to remember to impart?