

RMS™ “MY KEY” FOCUSER

(Review last week of month for following month)

Last Mtg Date	Name Company	Next Mtg Date	Topic/Goal	Next Action	Who	By When
10/23/12	Richard Prudential			Flu w/ DJZ re: status of Rich LWP Program & Schedule next mtg 30-45 days out	JRD	10/26/12
9/15/12	Stephen L	11/26/12				
9/15/12	Daniel B Northwestern Mutual	11/15/12				
8/23/12	Jeffrey Morgan Stanley	10/29/12				
7/11/12	Jeffrey Wealth Resources	10/30/12				
8/21/12	William M Wells Fargo Advisor	12/18/12				

Result of Meeting