

Client Meeting Documentation



GRP Investment Advisor Representatives must conduct a full review of all advisory clients at least annually to fulfill their fiduciary obligations and meet regulatory requirements under the Investment Advisers Act.

This requirement applies to all accounts under a GRP Investment Advisory Agreement, including those managed by third-party managers. This form documents the required client review and should be retained in the client file along with any supporting reports or materials.

Review Date:

Completed: In person

I. CLIENT DOCUMENTATION	
Client Name(s)	Account Number(s)
II. CLIENT SUITABILITY REVIEW	
Investment Objective Income with Capital Preservation Income with Moderate Growth Growth with Income Growth Aggressive Growth	
Time Horizon 1-3 years 3-5 years 5-10 years 10+ years	
Financial Status	
Risk Tolerance	

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III. PORTFOLIO REVIEW		
A. Asset Allocation		
B. Investment Performance		
C. Advisory Account Fees		
IV. ADDITIONAL MEETING NOTES		
V. Investment Advisor Representative ACKNOWLEDGEMENT		
IAR Signature	IAR Printed Name	Date