

**Subject:** Meeting Notes - Nylic, John - 9.6.17

**Date:** Tuesday, September 5, 2017 at 9:53:58 AM Central Daylight Time

**From:** Wesley R Young

**To:** Cheryl Green

**CC:** Stephanie McKinney, Cara McQuiston

Hello Cheryl,  
Please see notes and tasks.

Notes:

John and Wes had a location meeting. We will meet again on Wednesday the 20th for an expectation meeting. Stephanie will create the initial analysis in planning shepherd. And Cheryl will send out the GoToMeeting link.

Tasks:

- Initial Analysis – Stephanie
  
- GoToMeeting - Cheryl

Thanks,  
Wes

*“Plans are useful in the sense that they're proof that planning has taken place. The planning process forces people to think through the right issues.” – Chip Heath*



Wes Young & Associates  
6200 Bridgepoint Parkway  
Building IV, Suite 300  
Austin, TX 78730  
512-329-4286  
512-698-8974 mobile  
[www.wesleyoung.com](http://www.wesleyoung.com)

Registered Representative offering securities through NYLIFE Securities LLC, Member FINRA/SIPC  
Financial Adviser Offering investment advisory services through Eagle Strategies Corp., a Registered Investment Advisor  
The Nautilus Group is a service of New York Life Insurance Company

*If you do not wish to receive email communications from Eagle Strategies, please reply to this email, using the words "Opt out" in the subject line. Please copy [email\\_optout@eaglestrategies.com](mailto:email_optout@eaglestrategies.com). Eagle Strategies LLC, 51 Madison Ave., New York, NY 10010*