**Firm/Verifier Call Agenda**

1. Review current requests from verifier
2. Clarify questions about the verifier’s requests
   1. Gain an understanding for why certain documentation may have been deemed insufficient
   2. Discuss any misunderstandings in the verifier’s interpretation of the data provided
3. Verifier questions on the data provided
   1. Verifier’s opportunity to discuss instances where data provided did not make sense or the support was not sufficient
   2. Verifier can speak to any of their own misunderstandings in the firm’s interpretation of the data requests
4. Review current timeline and status
   1. Is the verification on track?
   2. Do timelines/deadlines need to be adjusted?
   3. If not on track, what is holding it up? And what can be done to expedite the remaining requirements?
5. Open questions for any other pertinent items and/or feedback
   1. Opportunity for any party to discuss any last-minute questions or provide final feedback on the flow of the project.
6. Discuss action items and next steps