Weekly Team Meeting Agenda

Client & Prospect Updates

- Meetings and calls with clients or potential clients this week
- Ensure all pre- and post-meeting/call activities are managed
- New Asset Report
- New (introductions) and Existing Clients with asset transfer completed ~ Advisor initiate investment implementation strategy
- New (introductions) and Existing Clients with asset transfer still in process ~ Assistant take appropriate steps for follow up
- Client birthdays, F.O.R.M. & Moments of Truth
- Sharing meaningful client feedback amongst the team

The Client Experience

- Client Service Activity
- Review Meetings
- PFO Binder Maintenance
- Client Relationship Activities
- Call Rotations
- Articles of Interest
- Moments of Truth
- Cards (Birthday, Thanksgiving, etc.)
- Client Events
- Other client experience issues
- Other

Our Strategic Partners

- Ongoing relationship management via Service Matrix
- Upcoming activities (i.e. meetings, calls, events)
- Quarterly Progress Reports
- Clients sent to them
- Introductions received from them

Business Development

- Ongoing business development projects
- Monthly Progress Reports regarding meeting goals & objectives

Other Business

- Training, courses and conferences
- Holidays and other absences
- Other