Quarterly Strategic Meeting Agenda

**OUR ANNUAL GOALS & YEAR-TO-DATE PROGRESS**

* + - * + Assets Under Management at this point & how we are tracking to the annual goal

Total AUM

Net new AUM

* + - * + Total Revenue at this point & how we are tracking to the annual goal
        + Total Number of Clients & how we are tracking to the annual goal

Number of New “A” Clients

Reduction or Realignment of Smaller Clients

Number of Referrals

**PROGRESS REVIEW OF OUR QUARTERLY GOALS & INITIATIVES**

* + Carefully review the Quarterly Strategic Progress Tracker:
    - Client Analysis
    - Client Experience
    - Client Onboarding
    - Client Rebranding
    - Marketing & Branding
    - Investment Management
    - Financial Planning
    - Insurance Solutions
    - Technology & CRM
    - Operations
    - Team Development
    - Working with Strategic Partners
    - Other
  + Share feedback and success stories related to these goals and initiatives.
  + Discussion & brainstorm any challenges or obstacles related to these goals and initiatives.

**SET PRIORITIES FOR THIS QUARTER**

* + Based on the review of all goals and initiatives discussed above, assess the following:
    - Identify next quarter goals and initiatives
    - Clearly define who is responsible for overseeing it
    - Define Action Items required for achieving completion

**MEETING WRAP UP**